DOCUMENT RESUME

ED 084 696 EA 005 677

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TITLE	Analysis of the Process and Methodology of the School Finance Study in Rhode Island: The Full State Funding Program.
SPONS AGENCY	Bureau of Elementary and Secondary Education (DHEW/OE), Washington, D.C. School Finance Study Unit.
PUB DATE	30 Jul 73
CONTRACT	OEC-0-73-2735
NOTE	141p.; Paper presented at National Symposium on State School Finance Reform (Washington, D.C., November 26 & 27, 1973); Related documents are EA 005 664 through 676 and EA 005 678 through 689
EDRS PRICE	MF-$0.65 HC-$6.58
DESCRIPTORS	*Educational Finance; Educational Legislation; Elementary Schools; Equal Education; Equalization Aid; *Full State Funding; *Program Descriptions; School Support; School Taxes; Secondary Schools; *State Aid; Symposia
IDENTIFIERS	Equity; Rhode Island; *State School Finance Reform

ABSTRACT

This report presents a history of the primary objectives, events, personalities, and consequences of the School Finance Study in Rhode Island. The study committee was commissioned with the task of developing a school finance plan that would provide equal educational opportunities to all pupils with similar characteristics and needs, achieve fiscal neutrality in the collection of revenues, and maintain all decisionmaking authority at the lowest level of management able to resolve the questions. The committee later undertook the task of developing a capital improvement finance plan as well. The paper describes the general and educational setting of Rhode Island, the various personalities who play a role in the school finance reform movement, and the development of the reform movement into a proposal for full State funding. A critique and analysis of the School Finance Study is also included. It is expected that this report will be of use to those who may want to analyze the factors operative in the finance study sequence, determine the cost of the study, or to speculate on future events in this area. (Pages 101-106, 115-123, 128, and 132 may reproduce poorly.) (Author/DN)

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ANALYSIS OF THE PROCESS AND METHODOLOGY OF THE SCHOOL FINANCE STUDY IN RHODE ISLAND

THE FULL STATE FUNDING PROGRAM

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EA 005 677

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ACKNOWLEDGMENTS

I am particularly pleased that the Task Force on School Finance provided the incentive for me to prepare this report. From the very beginning of the study on the school funding issue in Rhode Island, the intention was to one day analyze the total process. The request by the U. S. Office of Education for an "Analysis of the Process and Methodology of a School Finance Study in Rhode Island" placed me in the enviable position of having an opportunity to do something that I really wished to do, but had not found the time for until now. Dr. Thomas L. Johns of U.S.O.E. provided further dependable support by supplying answers to my questions and by meeting our mutually determined deadlines.

I am indebted to those persons who willingly gave of their time to be interviewed concerning their opinions on and their contributions to the school finance study. Their perspectives and recollections were useful in refreshing my own. Interviews were completed with Dr. Fred G. Burke, Henry W. Stevenson, Jr., Thomas H. Belcher, Edward F. Wilcox, Dr. Charles T. Schmidt, Jr., and Joseph A. Thibeault.

Henry W. Stevenson, Jr. was kind enough to review the preliminary draft of the report and to make several erudite suggestions for improvement. My own staff were most understanding about the time commitment necessary for the completion of this task, and have helped me by their own efficiency. Robert A. Reutershan returned for the express purpose of working on this project, and his contributions were, as always, an asset. I am also extremely grateful to Linda S. DiNola and Anne R. Gavin for their encouragement and basic support which have been so essential to the successful completion of this project.

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INTRODUCTION

In the preparation of this report, care was exercised to develop a document which would meet a variety of needs. The guidelines provided by the U. S. Office of Education, Task Force on School Finance were strictly adhered to in order to insure that the funding agency would receive a full measure of return for the investment made. The historical recounting of events was included for readers interested in the developmental aspects of the issue. Copies of all relevant supporting documents were supplied for users interested in probing into the specific recommendations of the Rhode Island plan. Lastly, an effort was made to present the materials in a manner which would appeal to readers, regardless of their reasons for reviewing this document.

Because of the inherent dryness of the general topic of school financing, the writing task was difficult; so to make a more interesting and, hopefully, a more readable presentation, the report has been cast in a format which borrows from the theater. The reader is invited to become somewhat familiar with the setting, the actors, and the action by reading the brief sketches provided, before delving into the analysis of the school finance study. As is true for all plans which are to some extent political, it is the personalities and the extraneous circumstances which may well be the deciding factors as to outcome of the Rhode Island full state funding plan. It is the flavor for these factors which I have attempted to impart.

In addition to trying to provide an account which is interesting enough to tempt the reader into continuing through the many pages of this document,

there are several specific objectives behind the work that has been expended on this project. To assist the reader in analyzing whether the report may be useful to his or her needs, I suggest that inquiries germane to the following list of objectives can be found within this document.

Objectives:

1. To compile, as objectively as possible, a historiograph of the primary objectives, events, personalities, and consequences of the School Finance Study in Rhode Island.

2. To analyze the factors operative in this sequence for generalizations which can be applied to future events in this area, so that the decision-making process can be improved.

3. To determine the cost in terms of time, personnel, and fiscal resources expended on this project to date and compare these costs with the results.

4. To speculate upon future events in this area in terms of predicted requirements for new data and research to meet the needs surfaced by new issues or to provide better answers to the same issues.

PROLOGUE

The case study technique has been an accepted practice in sociological research for many years. It is based upon the general premise that human conduct in any form can be studied and understood from the perspective of persons who are involved. The case history embraces the reporter's experiences, as he or she defines them, and the objectivity of the person's interpretation determines the objectivity of the final report.

The obvious appeal of employing the case history approach is that it results in a historiograph by a person or persons whose proximity to the events is close enough that an eye witness report can be made. Who should be in a better position to discuss and analyze what has happened than someone who was not only present but involved in the action? The "reality distance problem" which confronts many researchers who are several times removed from the questions under study is all but removed. Difficulties are posed, however, for the researcher who, by being a part of the action, also may have certain commitments to its results. As a general rule, the ability to tell the truth rests upon one's nearness to the event, but the willingness to tell the truth rests upon one's self-interest stake in the event.

In reporting what has transpired in Rhode Island under the rubric of the School Finance Study as a case study, there is no question that I have been close enough to many of the events to be a reliable reporter. Also at my disposal are my own notes, rough drafts of documents, correspondence, newspaper clipping files, and close personal contacts which were used to supplement and refresh my fallible memory. With these aids of proximity and materials, I cannot be viewed as a disinterested party for after having spent a large number of hours of my time

spaced over almost two years on this project, I can by no objective observer be considered bias-free. In an attempt to reduce the bias in this report, I have scheduled, as part of the project, interviews with many of the people who were key participants in these events. Their perceptions of what happened and why should be a good balance to my own perceptions and should also help to stimulate my memory of important features that may otherwise have been left unmentioned.

The advantage of a project of this type to the individual researcher is worthy of comment. It is only infrequently that one has the opportunity to review and analyze what has happened in the past; all too often we feel we cannot spare the time to be retrospective, but must rush on to the next project. One of the true benefits of writing this case history is that it forced me to recall a sequence of events in which I played a part and to ask myself how I might have improved the procedure and, more importantly, how I might improve my own decision-making capabilities in similar situations in the future. Hind-sight is a marvelous aid for saying what we should have done, but only in so far as it helps determine what we should do in the future is it beneficial.

THE SETTING

General Characteristics

Rhode Island is located in southern New England and is bounded on the north and east by Massachusetts, on the west by Connecticut, and on the south by the Atlantic Ocean. As the smallest state in the nation with a land area of only 1,049 square miles, only an hour is required to travel from one end of the state to the other. Narragansett Bay ranks as one of the most competitive features of Rhode Island by combining the advantages of a good natural harbor with the attractions of a physical setting conducive to leisure time activities. Extending in from the sea 28 miles, the bay acts as a natural divide between the two sections of the state.

In 1970 the population of the state was 946,725, thus giving Rhode Island a population density of 903 persons per square mile, or the second highest density in the nation after New Jersey. Most of the people live in urban areas, which accommodate almost 90 percent of the state's population. Despite the high ratio of people to land, the state still has large tracts of open spaces which enhance its natural beauty. The residents of these areas tend to retain a rural perspective, which gives the state a gradation of points of view, which range from urban to rural with a large mix of suburban interests.

Providence, the capital city, located at the head of Narragansett Bay is the center of the urban area. With a population of 180,000, the city dominates the state in many respects, both because of its comparative size and the political advantage this entails, and because of the business interests located

within its boundaries.

Economically, the state's position is not as strong as its natural attributes might suggest. With the strategic advantage of its geographic location close to the commercial centers of the northeast and mid-Atlantic states and its access to land, sea, and air transportation routes, Rhode Island should prosper. Hampered, however, by a higher than average unemployment rate, a job market primarily for low skill and low paying jobs, a high preponderance of small, privately held manufacturing firms, a tax structure which discourages capital investments, and finally, a lack-luster economic growth image, the state's economy lacks stamina.* The recently announced extreme reduction in the U. S. Navy's operating facilities in the state will in the near future further compound the state's economic shortcomings. Extensive projects by both the private sector and the state are being directed toward attempting to reverse this unfavorable trend.

Politically, Rhode Island is highly partial to the Democratic Party and over two-thirds of the voters are registered Democrats. Rhode Islanders do, it would appear, retain some independence of mind at the polls and elected a Republican as governor for three terms during the 1960's. The congressional delegation, however, has remained solidly Democratic for the last thirty years.

The General Assembly is composed of 100 members in the House and 50 members in the Senate. All the legislators, as well as the state's general officers, stand for election every two years. Thus, the state government officials are <u>always</u> preparing for the next election.

* <u>The Rhode Island Economy: A Plan for Its Future</u>, Prepared by Project Rhode Island, November 1972.

Most of the state's residents would attest to the fact that Rhode Island is a pleasant place to live. Perhaps not exciting or dynamic, but comfortable for many people, Rhode Island is slowly trying to find its way in a rapidly changing world.

Educational Structure

The public school population in Rhode Island is approximately 190,000 students enrolled in kindergarten through high school. The Catholic schools enroll an additional 30,000 students and 4,500 are enrolled in the independent schools.

Forty school districts serve the state and range in size from 85 students on Block Island to a high of 25,000 students in the City of Providence. Within the state, school districts are conterminous with city and town boundaries, with the exception of three regional districts. None of the districts are fiscally independent with the power to tax, thus all are dependent on the governing bodies of the communities for approval of school budgets. The local districts' share of the cost of school operations and maintenance is raised at the same time and by the same property tax levy, as are funds for other municipal operations.

In 1971 the state ranked 22nd in the nation in per capita expenditures for education and 24th in per capita statewide property tax revenues. In school expenditures, however, Rhode Island ranked among the leaders in the nation by spending $1,075 per pupil in average daily membership in 1972-73, the tenth highest in the country.

In keeping with the emphasis on the labor movement in the state, almost all the public school teachers are represented by one of the two teachers' organizations; these organizations are the Rhode Island Education Association and the Rhode Island Federation of Teachers. The R.I.E.A. represents the majority of school districts, while the R.I.F.T. represents the larger number of teachers.

Due to the compactness of the state and the relatively small size of the student population, the professional educators in the state are all well acquainted with one another. State department staff, superintendents, and faculty members at the state institutions of higher education almost all are on a first name basis with each other. The advantage of this familiarity when introducing a new concept, such as change in the financing system, is tremendous. Little time must be expended in becoming acquainted with those whose opinions must be consulted and whose support is sought.

The Education Act of 1969

In 1965 the General Assembly took notice of the fact that the cost of education was soaring higher and higher, and that no one was too certain how well Rhode Island was doing in providing quality education for its youth. From 1960 when the state aid formula was introduced until 1964, the state's share of public education costs more than doubled. The increases in cost, the General Assembly felt, were not commensurate with an increase in quality. Therefore, $25,000 in seed money was made available to explore the feasibility and practicality of making a comprehensive study of Rhode Island's education system.

During the 1965 Legislative Session, a bill was passed establishing a commission with the formidable title, Rhode Island Special Commission to Study the Entire Field of Education. To shorten the name, the Commission was most frequently referred to as the Thibeault Commission after the second chairman, Joseph A. Thibeault, at that time the Representative from Cumberland. Funded with $225,000 over a three year period, the Commission was charged with studying the broad field of education in Rhode Island. Two of the specific tasks assigned the group by the General Assembly were the investigation of "the need for the revision and modernization of the organizational and financial structure of the school systems of the state" and "a review of the present formula for the distribution of state funds for local education."

Under the guiding hand of Dr. Henry M. Brickell as Chief Consultant, eleven reports were prepared and 269 recommendations were generated. At the request of the Legislature, the first of the studies undertaken was an in-depth analysis of the operation of the state aid formula. Drs. Charles S. Benson and James A. Kelley jointly conducted the study, and the recommendations from their report were accepted by the Commission. Drafted into legislation, five recommendations were introduced as a single successful bill in the 1967 Session. Implemented in 1968, these changes included:

1. redefinition of the wealth factor in the formula to include an adjustment for community median family income.
2. exclusion of intangible personal property from the wealth factor.
3. reduction of the arbitrary factor in the formula, which governs the average percentage of local support for education, from 0.7875 to 0.6500.

4. redefinition of average daily membership count to include kindergarten students counted as one-half for each actual child.

5. addition of Sections 4 and 5, which provide categorical aid for economically disadvantaged students and handicapped students.

The Education Act of 1969 was a direct out-growth of the Commission's work and much of the language in the act was taken directly from the final report of the Commission.* The most sweeping change instituted by the act was the replacement of the state's two governing boards for education, the Board of Trustees of State Colleges and the Board of Education, with a single Board of Regents. All public education in Rhode Island from kindergarten through graduate school was placed under the control of a single board.

The act specified that a nominating panel must submit to the governor no less than two nominations for each of the vacancies on the board. From the list submitted to him, Governor Licht announced his selections of the nine original Regents on September 12, 1969. The list of Regents included - a former governor, the former chairman of the Board of Education and three other members of that defunct board, the treasurer of Governor Licht's successful election campaign, a member of the Governor's tax program promotion group, and the vice-chairman of the Commission to Study the Entire Field of Education. The group was bipartisan with at least three known Republicans; had one woman member and one black. The Board initially looked to be prominent, knowledgeable, and as if it had been selected on factors traditionally important in Rhode Island.

*Education in Rhode Island: A Plan for the Future, Final Report to the General Assembly, Rhode Island Special Commission to Study the Entire Field of Education, June 1968.

Meeting first at the end of September 1969, the Regents were confronted with the task of selecting a professional chief executive, establishing the scope of and procedures for operations, and determining the relationship between the Board and each of the agencies it was to govern.

The question of how to best comply with a provision in the law, that by January 1971 a school district reorganizational plan would be forwarded from the Regents to the General Assembly for action, became a top priority item. The course selected by the Regents entailed the delineation of a series of criteria for formulating an acceptable plan to reorganize the state's school districts. Groups interested in this subject were asked to react "constructively" to the criteria, and a series of public hearings were scheduled to facilitate the exchange of views between the Regents and the public.

At the six meetings held around the state over a six week period, the Regents drew capacity crowds. The public made clear in no uncertain terms at several of the meetings, that it was adamant in wanting no part of regionalization. The Regents were bombarded by angry,embittered speakers, who strongly voiced their dissent toward any move to alter the existing district lines or to bus students between districts. The Regents received more public feeling than they had anticipated and the effect of this initial excursion into trying to involve the public in policy decisions left a mark upon them.

For the next two years the Board of Regents continued to grapple with the same problems which faced it at the out-set, with the exception of the selection of a chief executive officer. Over time, the Regents were increasingly criticized for their inability to make decisions and to take action, and for their propensity for becoming mired in trivia, while allowing the larger questions to go unanswered or even unheeded.

THE ACTORS

The people who played a role in the unfolding of the School Finance Study in Rhode Island might be classified according to the extent to which they were directly involved in the decision-making process. The individuals with a high degree of responsibility for decisions on the school finance issue are the major actors in the production, and those whose contributions were primarily advisory or ancillary are the supporting cast. In the descriptions that follow, no differentiations are drawn between the two types, partially because this distinction is not clear cut. It is frequently difficult to tell who advises and who decides.

For the reader who is unfamiliar with the Rhode Island scene, brief biographical sketches of the actors are included. By knowing something about the players, one may have a better feel for why the subsequent events described in this paper occurred.

Fred G. Burke

On January 1, 1971, Dr. Fred G. Burke became the first Commissioner of Education named by the Board of Regents. His academic credentials include a B. A., magna cum laude, from Williams College in 1953; graduate studies at Princeton and Oxford; and a Ph. D. in Political Sciences from Princeton in 1958. Dr. Burke has taught at Ohio Wesleyan University, Syracuse University, and the State University of New York at Buffalo, and while at Buffalo he served as the Dean of International Studies. Dr. Burke is recognized internationally as an expert on African government.

Since coming to Rhode Island, Dr. Burke has expended his efforts towards developing the State Department of Education into a viable organization capable

of providing leadership to the educational institutions of the state. He has ably combined his theoretical training in political science with his own intuitive political acumen to accomplish change in the structure of education. The question of educatioral governance and what it entails for all levels of education is of prime concern to the Commissioner. The connection between educational funding systems and governance is clear, and it is not surprising that he made this area a prime target for immediate review with an eye towards reform.

Dennis J. Roberts

Dennis J. Roberts, as first chairman of the Rhode Island Board of Regents, had a unique background for that position for as a life-long and successful politician, he has had a large measure of practical experience with state government. Mr. Roberts has been Governor of Rhode Island (1951 to 1959), Mayor of Providence, State Senator, State Democratic Party Chairman, and unsuccessful candidate for the Democratic senatorial nomination in 1959. He has also served as a Delegate to the United Nations, as Chairman of the Rhode Island Constitutional Convention, and as Chairman of the Providence Human Relations Commission. A graduate of Fordham University and Boston University Law School, Mr. Roberts is senior partner in the law firm Roberts and Willey, Inc. in Providence.

During his tenure of office as Governor, Mr. Roberts expressed strong support for the concept of regionalized or city-state government for Rhode Island. Arguing that because of the compactness of the state and the small population, the multiple divisions into which the state was divided were inefficient, he lobbied strongly for the provision of services on a larger area basis.

Dennis Roberts has been accustomed to having people listen when he speaks, and uses both his physical stature and voice to emphasize the importance of what

he says. His political sensitivities are never far from the surface and, as Chairman of the Board, he was always acutely aware of the political implications of the Board's decisions and always openly expressed concern for how the public would view these actions.

Frank Licht

Frank Licht was elected Governor of Rhode Island in 1967 and served for two terms until 1972, when he chose not to seek another term. Prior to his election as Governor, Mr. Licht served as an Associate Justice of the Rhode Island Supreme Court and as a State Senator. He is a Democrat.

He graduated Phi Beta Kappa from Brown University in 1938 and received his LL.B. degree from Harvard. Active in many civic, charitable, religious, and educational organizations, he is now a law partner in the firm of Letts, Quinn, & Licht and during the last year delivered a series of lectures at Harvard University.

A quiet and unassuming man, Governor Licht never looked the part of a governor who enjoyed the social obligations of his job, the speech making or glad-handing. He is known as an intellectual, though his scholarly approach was always tempered with sound political strategy. His first term was marked by a flow of new legislation from the executive branch primarily aimed at reorganization of state government, including the Education Act of 1969. His second term was marred because of necessity he instituted an income tax, despite his campaign promise not to do so.

Philip W. Noel

Philip W. Noel, Governor of Rhode Island, was formerly Mayor of Warwick, City Councilman, an aide to Senator John O. Pastore, and clerk to the Rhode Island Constitutional Convention. The Governor is a 1954 graduate of Brown University and received his J. D. from Georgetown University in 1957.

Before his election as Governor, Noel served as the President of the Rhode Island League of Cities and Towns. While he was mayor of the second largest city in the state, he became interested in the topic of school finance. His early views on this subject were incorporated into his campaign promises. Excerpts from these statements include* -

> Several recent court decisions may require an extensive revision of the way we finance education in Rhode Island. But even if the courts do not require a change, I believe we must make a change because the present system is unfair and ultimately self-defeating.
>
> There are many serious questions that must be answered in any consideration of a statewide teacher salary scale.... The governor already has appointed the members of a commission to study the entire area of education finances. I would ask this commission to also consider a formula to implement this concept.
>
> Our older teachers have put in many years of dedicated service, and they deserve a better retirement system. Besides benefitting both the older teacher who wants to retire and the young teacher who wants a position, a reduction in the teacher retirement requirements, possibly to 30 years of service, would save the taxpayer money.

* Providence Evening Bulletin, "Pledges Not Forgotten-or Carried Out," June 8, 1973, page 1.

The Governor has a close working relationship with Commissioner Burke which pre-dates his election. Both as mayor and Governor he has sought the advice of the Commissioner on educational issues and the two men appear to have a high degree of mutual respect for each other's abilities as leaders in their respective fields.

Robert A. Riesman

The second and last Chairman of the Rhode Island Board of Regents, established under the 1969 Act, was Robert A. Riesman. Mr. Riesman is a highly successful businessman whose governmental experience prior to his appointment to the Board was primarily in an advisory capacity.

Active in many different religious and charitable organizations, Mr. Riesman has been a member of the U. S. Department of Commerce's Industrial Advisory Committee, the Board of Directors of the Development Corporation of Israel, and Chairman of the United Fund. He serves as a director, trustee, executive vice-president and president of several banks and corporations. In 1940 Mr. Riesman graduated cum laude from Harvard University.

Mr. Riesman is a debonair man who has the enviable combination of an attractive appearance, brains, and money. He is a close friend of Dennis Roberts, and only rarely, if ever, did these two vote on opposite sides of an issue while serving on the Board.

Thomas H. Belcher

Governor Licht appointed Thomas Belcher as the Chairman of the Governor's Commission on School Finance. Mr. Belcher is the Vice-President of the Industrial National Bank in charge of Money Management. His qualification for the appointment is based upon his expertise in municipal securities for capital educational expenditures, which has been broadened by his experience

as Chairman of both the Foster Commission to Study the Year Round School and the Foster Vocational School Committee.

A graduate of Pace College in 1951, with graduate training at the Stonier Graduate School of Banking at Rutgers University, Mr. Belcher worked with a public accountant consulting firm prior to his employment with the Industrial National Bank.

Henry W. Stevenson, Jr.

Henry W. Stevenson, Jr. was appointed to his present position as Assistant Commissioner for Research, Planning, and Evaluation in the Rhode Island Department of Education in January of 1971. Prior to joining the Department, Mr. Stevenson had been employed for 25 years by the Rhode Island Public Expenditure Council, a private organization dedicated to research in the field of governmental financing. For seven years he served as the Executive Director of the Council.

Mr. Stevenson received his B. A. from Brown University in 1938 and an M. P. A. from the University of Rhode Island in 1970.

During his tenure with the Public Expenditure Council, Mr. Stevenson did a great deal of research in the area of educational finance. He was one of the prime supporters of the institution of the present percentage equalizing educational aid formula, which in 1960 replaced the categorical aid programs then in existence. He also served as a consultant to the Commission to Study the Entire Field of Education (The Thibeault Commission).

While with the Department of Education, Mr. Stevenson has directed the on-going study of school finance, and has brought to bear on the study his extensive knowledge on both public financing problems and the intricacies of working within a political environment.

Cynthia V. L. Ward

I was hired by Mr. Stevenson in the Summer of 1971 to assume the duties and title of Education Research Specialist. Mr. Stevenson was familiar with my work as a Research Associate for the Commission to Study the Entire Field of Education and knew that from that experience I had some familiarity with the ways in which education was organized and managed in Rhode Island. In particular, he thought that my association with the fiscal study undertaken for the Commission by Drs. James A. Kelly and Charles S. Benson would be useful to the Department.

My academic credentials are somewhat suspect for someone investigating school finance. I graduated with a B. A. in Chemistry from Southern Illinois University in 1957 and completed an Ed. D. at Harvard University in 1966. In the interim I secured experience as a high school teacher and did advanced work at Oxford University.

A large portion of my time since joining the Department has been spent collecting data, analyzing alternatives, writing descriptive materials, and answering questions on the funding of public schools. For me it has been an experience that I would not like to have missed.

Robert A. Reutershan

Robert A. Reutershan served as staff assistant in the Education Department's Division of Research, Planning, and Evaluation from September of 1972 through the middle of January 1973. Prior to that time he had served as a part-time intern in the Division for four months and as a full-time intern during the summer of 1972. Mr. Reutershan is a 1971 graduate of Colgate University and received his Master's Degree in Public Administration in June of 1973 from the University of Rhode Island.

THE ACTION

CHRONICLE OF EVENTS

In order to permit both the reader and the writer to analyze what has happened in Rhode Island in respect to the developments in the full state funding saga, it is imperative that the events of this story be described in a logical sequence. To achieve this purpose, the description section has been written in three separate parts which represent the distinct phases of development. These phases will be presented sequentially and include these periods:

a) The Pre-Proposal Period

b) The Proposal Period

c) The Post-Proposal Period

The important features and salient factors for each of these periods will be presented and discussed in an effort to reconstruct, as objectively and accurately as possible, the setting in which the events transpired. On the basis of this relevant, though admittedly selected information, the reader can judge the validity of the conclusions.

PRE-PROPOSAL PERIOD

July 1971 - December 1972

To appreciate what changes were later to be considered as possible alternatives to the existing method for funding elementary and secondary education in Rhode Island, it is necessary to examine the present system. When the Board of Regents assumed their duties in September of 1969, they inherited a method for state support to local districts of the percentage equalizing type, which is referred to as the State Aid Formula. A description of this system is included for readers who are unfamiliar with either this general type of state support system or for those interested in the specifics of the Rhode Island version.

System for State Support for School Operations

With the exception of two minor categorical aid programs, Rhode Island has had since 1960-61 a single, comprehensive program of the equalizing percentage type for state financial assistance to local districts for school operations. Chapter 27, P.L. 1960, provides that the state will assume a given proportion of the locally determined school expenditures without limits on the extent of these expenditures. One of the goals of this legislation is to preserve for the citizens of the local districts the right to determine the level of excellence of their schools and to provide the means to achieve this excellence. The "open-ended" provision included in the Rhode Island law is somewhat unique for state aid programs; its intent is to stimulate local initiative.

To be eligible for state support, each district must meet two provisions

of the law:

1. District must expend a minimum of $500 per pupil including state aid. (Presently, no district approaches this low level of spending, so that this provision poses no threat for discontinuance of state funding. However, at the time of enactment, the inclusion of this minimum did force some districts to increase the level of spending.)

2. A minimum teacher salary of $4,000 is mandated. (The actual starting salaries in the districts far exceed this amount, so the intent of the provision in the law to maintain salaries at a reasonable level is negated.)

The application of the state aid formula requires the determination of district expenditures in which the state will share and a ratio which represents the degree of state assumption of these costs. To determine reimburseable expenditures, each district reports expenditures for current operation of the public schools on a form (Form 31) submitted to the State Department of Education. The forms are checked for accuracy by the State Department, but are not audited. The decision as to what kinds of programs and functions are appropriate educational expenses remains in the hands of the local school committees, and they, not the state, establish the magnitude of the school expenditures.

Form 31 is submitted in late summer and presents an accounting of the sums spent for the immediate preceding school year, called the reference year. For example, in August 1972 the expenditures reported were for the reference year 1971-72.

Establishing the state share ratio involves several steps. Rather than apply a standard ratio to all districts, regardless of wealth, this portion of the state aid formula selectively determines the "fair share" of state support for each district. However, some districts (eleven of forty in 1972) benefit from a provision in the law which guarantees a minimum of a 30 percent reimbursement. In affluent districts, therefore, degrees of wealth do not affect the state share ratio, and these districts receive the 30 percent reimbursement without regard to the actual property valuation behind each child.

For all but the minimum (30 percent) districts, the state share ratio is related to the comparison of the equalized weighted assessed valuation, adjusted by median family income per resident pupil in average daily membership in the district, to the equivalent measures for the state. This portion of the formula attempts to provide a strong, positive relationship between the ability of the community to pay and the degree to which the state will share in providing funds for support of public schools.

In the actual computation process, the first step is to develop a standard tax rate for the state which would be adequate to raise sufficient funds to meet the minimum mandated program of $500 expended per pupil. The following steps are required to compute the standard tax rate:

1. The adjusted resident average daily membership* for the state is multiplied by $500, to which transportation costs are added to yield the cost of the basic program.
2. The basic program is multiplied by an arbitrary constant (currently fixed at 0.65), which represents the overall average statewide local share of public school support, to determine the proportion of the support to be provided from local sources, i.e., the

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*ADM is adjusted for sparsity and is based upon public or public and non-public

property tax.

3. The cost of 65 percent of the basic program (2) is divided by the equalized weighted assessed valuation for the state to determine the state standard tax rate. This value reflects the rate required to raise sufficient funds to provide for 65 percent of the basic school program.

The state share ratio utilizes the state's standard tax rate and the local wealth factor (ewav) to determine the proportionate local-state share. These steps are required:

1. Find the cost of the local basic program by multiplying the number of pupils in resident average daily membership by the mandated minimum program and add transportation costs.
2. Apply the state standard tax rate to the local adjusted equalized weighted assessed valuation to determine the local share which is produced by the state standard rate.
3. The difference between the cost of the local basic program and the local share produced by the state standard rate, divided by the cost of the basic program, yields that proportion of the basic program which will be provided by the state. This factor is known as the state share ratio.

To ascertain the actual state entitlement due to the district, the state share ratio for the district is applied to the approved district expenditures for the reference year. Net expenditures are determined by subtracting received tuitions, federal aid to impacted districts funds (P.L. 874), other federal aid, and miscellaneous incomes from the total gross expenditures for school operations (as reported on Line 90 of Form 31).

In algebraic form, the present state aid formula would appear --

$$G = E\left(1 - X\left[\frac{\frac{ewav}{(radm \times \$500) + t}}{\frac{EWAV}{(RADM \times \$500) + T}}\right]\right)$$

Where:

G = State share entitlement to the district

E = Approved net expenditures for the district for the reference year

T = Transportation cost for all districts

t = Transportation cost for individual districts

ewav = Equalized weighted assessed valuation adjusted by a factor which represents the relationship of the median family income of the community to median family income of the state as a whole

EWAV = Equalized weighted assessed valuation for the state

radm = Resident average daily membership for the district

RADM = Resident average daily membership for the state

X = Arbitrary constant denoting the overall average community share ratio, presently set at 0.65

Sections IV and V of Chapter 160 (P.L. 1967) provide categorical aid to disadvantaged pupils and handicapped pupils. These sections were included to provide some financial relief for the urban-industrial communities which have a disproportionate number of these pupils. Two million dollars is appropriated annually for distribution to the districts according to the latest known ratio of Title I [Elementary and Secondary Education Act of 1965 (P.L. 89-10)] entitlement pupils in a district to the total Title I entitlement pupils in the state.

The Title I entitlement pupils are determined by a count of children of low income families, in foster homes, and in families receiving Aid to Families with Dependent Children. The Department of Education is responsible for computing the ratios for the distribution of this money.

Categorical aid for the handicapped is established at one million dollars annually. The money is to be used to assist local school districts to expand programs and/or help defray the costs of existing programs. The allocations to each district are based upon the ratio which the number of handicapped children in the district bears to the total number of handicapped pupils in the state. An annual census is conducted by the Department of Education to determine the number of students in each district who are classified as handicapped.*

Contemplated Changes to Present System

Certain aspects of the existing state support system have long incurred the displeasure of state legislators. The open-ended feature was made a provision of the law to stimulate local initiative to provide creative, innovative educational programs and to insure local determination of spending levels. This provision places a burden upon the state to match local spending according to the state share ratio level, as determined by the formula, without permitting the legislature to play any part in deciding the actual level of spending. The charge that, "they (the local districts) have the say while we (the state legislature) must pay," is a frequently heard complaint, especially as the end of a legislative session

*A suit brought by the Rhode Island Society for Autistic Children, Inc. against the Board of Regents and several heads of various state departments may have a significant impact on future allocations of funds under this statute. The suit charges that due process and equal protection have been denied to many students placed in special education classes. The results of this case may cause alterations in the number of students in special education classes in the state.

approaches and additional state funds are needed to provide adequate matching monies. The difficulty of correctly estimating what funds will be necessary to meet the state's share of school operations costs is also a headache for the legislature. The actual expenditure figures for the reference year on which reimbursement is made are available in August, while the legislature usually adjourns in May. The early estimates of local expenditures on which the initial budget figure is based have, in the last few years, proved to be too low. The necessity for a special appropriation coupled with the high cost of the program does little to endear the state aid system of school support to the legislature.

State legislators took on the open-ended issue in their long 1971 session with hopes of finding some way of curtailing this spending. They were disappointed.

Governor Licht, too, expressed concern on this issue, and in his 1969 inaugural address he stated:

> Rhode Island is faced with serious fiscal problems. Over the past few years our citizens have been witness to a staggering increase in expenditures of state government. If these expenditures continue unchecked, the fiscal integrity of the state will be seriously threatened.
>
> The facts are these: The state operates under open-ended spending legislation, principally in the areas of aid to local schools, public assistance and medical assistance. Furthermore the fiscal requirements for higher education have escalated beyond original projections . . . The spiralling cost of health care and the very formula under which the state medicaid program is administered make it impossible to project an accurate budget in that area.

Later in his administration, the Governor changed his mind and expressed the opinion that placing a ceiling on open-ended spending merely would redirect

the pressure to another quarter. He emphasized his belief that the freezing of school aid would shift the cost of education from state taxes to local property taxes.

Accompanying these concerns about the system for distributing state aid was the continually spiralling cost of education. Costs rose from $16 million in state aid to local districts for school operations in 1963 to $65 million in 1973, a rise far in excess of combined effects of inflation and growing student populations. As costs mounted, the legislature pressed the educational establishment to defend these increases and to investigate means to reverse or at least slacken the trend.

The most direct link of the legislature with the operation of schools is through the State Department of Education. It was through this channel that the legislature, in the person of Senator Francis P. Smith, Chairman of the State Finance Committee, made clear an interest in this issue to Henry W. Stevenson, Jr., Assistant Commissioner for the Division of Research, Planning, and Evaluation. Mr. Stevenson, because of his broad experience in the field of public finance, as a result of 25 years with the Rhode Island Public Expenditure Council, was uniquely prepared to assume the task of grappling with this problem. One of his first concerns upon assuming his role in the Department in January of 1971 was to identify the school finance issue as a major area for investigation.

In an interview with Mr. Stevenson,* he recalled three primary reasons

*Mr. Stevenson was interviewed and his comments were taped by Robert Reutershan on May 31, 1973.

that he made the choice. He listed these reasons --

1) The concern of the people in the General Assembly and in the state administration relative to the mandated increase brought about by the operations of the present school aid formula.

2) The requirements in law (Title 16-7-33) that the operations of the state aid act be periodically examined for possible improvement.

3) As a result of the requirement in the 1969 Education Act that the Board of Regents report to the Legislature recommendations on the number and size of school districts, the consultant firm of Engelhardt and Engelhardt, Inc. was retained in 1970 to investigate the problem. The Engelhardt report* included a section by Joseph M. Cronin in which the suggestion was made that a possible change in the method of state financing of public schools might be worth considering. This stimulated interest on the part of the Commissioner, who thought that a study of alternatives of financing education should precede any consideration for the establishment of new school regions.

As early as July 1971, Mr. Stevenson assigned the task of exploring and evaluating possible modifications or alterations to the state aid formula to me, as my first assignment as a member of the research staff.

*"New Patterns for Public Education in Rhode Island," Volume 2, Engelhardt and Engelhardt, Inc., April 1971, pages 29-32.

Alternate Models for Allocating State School Aid

Stemming from the identification of public school finance as a major research problem, an investigation of the state aid formula was undertaken. By August 1971, six different models were proposed for Departmental review. Each of these models is described briefly, as a way of indicating the thinking of the Research staff after the study had been underway for a month.

Model I - State aid formula to remain essentially unchanged

Model Ia - Retain the present formula intact, and eliminate the basic minimum 30 percent aid provision; each district would be given its "fair share" as computed from the formula.

Model II - Limit the reimbursements permitted under the school aid formula by specifying which items and services would be eligible for inclusion.

Model IIa - Realizing that some line items of school expenditures are regularly reduced when budgets are tight (for instance instructional material), supplementary grants would be earmarked for these expenditures to offset a depressed level of spending.

Model III - Exclude from reimbursement those special programs which tend to inflate school costs (e.g. handicapped, disadvantaged, special education, vocational education, adult education, etc.), and fund these programs directly from the State budget.

Model IIIa - Identify those programs and services which could be most economically and effectively provided by the state, and fund these directly from the state budget. This model is explicitly linked to reorganization of districts and could logically be a primary step in this direction. Some services to be so funded might include: transportation, purchasing of supplies and equipment, food services, and data processing.

Model IV - Retain the open-end provision for all expenditures in the category of "Instruction" and make a flat allotment on a per pupil basis for all other expenditures.

Model V - Eliminate the state school aid formula and substitute flat grants to the districts on a per pupil basis. Grants could be of varying magnitudes for different student populations. Assuming that a given amount of money is available from the State to support education at the local level, this money would be distributed between districts according to the number of pupils in average daily membership. To reinstate the equalization factor into this grant system all monies for local education both from income and property taxes would be collected on an equalized statewide basis. Wealthy and poor communities alike would pay their appropriate share, and each community would have the option of funding educational activities at a higher rate if they so choose by raising additional funds at the local level.

Model VI - Fund local school districts based on attainment of desired outcomes. Having structured statewide objectives for education, districts which could demonstrate that these goals were being met would be rewarded, thus making education a competitive business.

Each proposed model was accompanied by a listing of probable advantages and disadvantages which might result on implementation, and a suggested study program for investigating the feasibility of each.

The decision was made within the Department that all the suggested models should be considered and, that prior to judging the suitability of each, a cost analysis of each model was required. Therefore, a data collection effort was mounted to secure the necessary information to test the fiscal requirements of the proposed possibilities. To achieve this end, the models were spelled out in sufficient detail that data could be secured and an analytical program written for each model. Eventually, 35 separate possibilities were defined and categorized into three types by the Research Section. The three different classifications of modifications and the specific changes necessary for implementation are listed on the following pages.

Type I - Modifications Which Require No Change in the Basic Format of the State Aid Formula

1. Change the pupil base from RADM to school district's total population count.
2. Weight the pupil base by counting "economically disadvantaged" pupils as more than one. (1.5 and 2.0 were used)
3. Weight the pupil base by counting "educationally disadvantaged" pupils as more than one. (1.5 and 2.0 were used)
4. Lower the arbitrary formula factor from 0.65 to 0.60 and 0.50.
5. Eliminate the guaranteed minimum of 30 percent.
6. Increase the guaranteed minimum to 35 percent.

Type II - Elimination of Special Programs and/or Services from the Formula

1. Eliminate all instructional salaries from reimbursement formula and fund as state allocation.
2. Eliminate all instructional and administrative salaries from reimbursement formula and fund as state allocation.
3. Eliminate all instructional and administrative salaries and associated fringe benefits (retirement, federal social security, health insurance, life insurance, etc.) from the reimbursement formula and have the state assume these costs.
4. Eliminate from local educational expenditures all contributions to the teachers' retirement fund supplied from local revenues.
5. State assumption of program costs for special education students.
6. State assumption of vocational education program costs.
7. State assumption of costs for transporting students.
8. State assumption of food service costs.
9. State assumption of health services costs.
10. State assumption of expenditures for data processing services.
11. State assumption of the cost of evening schools and summer schools.
12. State assumption of the costs for special services (i.e. transportation, food, health, data processing, and evening and summer schools).

13. State assumption of costs for auxiliary agencies.

14. Restriction of reimbursement formula to instructional costs only, with the provision of a flat grant to cover other expenditures.

15. State assumption of instructional salary and benefit costs, reimbursement for other instructional costs, and a flat grant for other expenses.

16. Limit reimbursements to a given percentage of the state average per pupil expenditure.

17. Limit reimbursement to a given percentage of the district expenditures for the year prior to the reference year.

Type III - Substitution of Other Types of Funding Systems for the Percentage Equalizing Formula

1. Replace formula with a simplified version.

2. Replace formula with an equalization grant based upon a weighted measure of student need.

The primary reason for going through the exercise of listing each of these considered alternatives is to indicate the breadth of the information required to evaluate the results of each, in terms of costs. Much of the data were available in the Department and needed only to be secured, checked, and prepared in the correct format. The fiscal reporting form [(Form 31) required of each district by July 31st each year provides the data which are the basis on which the state entitlement for the district is calculated] was an invaluable source of information. From the sample form in Appendix A it is clear that data on expenditures according to function are readily available. It is at times like these that one is extremely lucky to be working in a state with only 40 separate school districts, for the tedium of a task of this type would be unbearable for all but the true devotee of figures if many more districts were involved. The time and mental anguish required

to insure that the correct figures were recorded and that equivalent data were secured, due to the fact that the districts are not uniform in their reporting procedures, was not incidental. Since Form 31 is not audited (it is only a reporting form), strict recording procedures are not enforced; for reimbursement purposes it makes little difference in which column the figures are placed so long as the total is correct. However, when the cost by function is the issue, careful reading of the forms, the postulating of reasonable assumptions, and checking back with individual districts is necessary, if the figures are to be within a reasonable error range.

In addition to the data available on local expenditures from From 31, other types of required information were collected from a variety of sources. A summary indicating data type and source is recorded in Table I.

TABLE I

Data Requirements for Proposed Alternatives

1970-71

Type of Data	Source of Data
Local expenditures for school operation by function (1970-71)	Form 31 - Public School Finance R.I. Department of Education, 1970-71
Characteristics of the professional staff in the local districts	Teacher Certification Permanent Record and Annual Teacher Survey (See Appendix B) R.I. Department of Education
Costs for providing programs for different types of special education students	Information on costs compiled 1968, updated to 1970-71 R.I. Department of Education
Number of special education students by type in each district	Annual Census of Special Education Students R.I. Department of Education 1970-71
Estimates of costs of school lunch programs	Communique from the Coordinator of School Food Services R.I. Department of Education 1970-71
Cost estimates of health insurance plans for professional personnel in each district	Communique from Rhode Island Blue Cross and Blue Shield - October 1971
Population count estimated for school districts	U.S. Census - 1970
Title I count of economically disadvantaged students	Information provided by the R.I. Department of Education - Title I Office - 1970-71
Testing results used to estimate educationally disadvantaged students	R.I. Department of Education - Statewide Testing Program - 1970-71
Teacher retirement contributions	R.I. Department of Administration 1970-71
Estimated cost of vocational education program	Consultation with research staff member completing an analysis of vocational education costs R.I. Department of Education - 1970-71

From the time the original data for 1970-71 were available in late August until the necessary facts were accumulated to run the cost estimates, hours of both secretarial and professional staff time were spent compiling the figures. By late October 1971, the first computer analyses were made and by hand checking the results on a sampling basis the programming was refined until useable results were produced by mid-December.

The computer print out* was designed to show the calculated estimated cost of each of the alternatives for 1970-71 and to compare this cost both in absolute and percentage terms with the true state reimbursement expenditures for 1970-71. In all of these calculations federal funds were removed before any of the data were submitted for analysis, so that only state and local funds are part of the consideration -- the rationale for this being that federal funds would remain the same regardless of the state system of funding, and therefore could be eliminated as a simplification step.

A Question of Equity

While work was underway to generate and evaluate possible modifications to the Rhode Island funding system, events outside our borders occurred which had a significant impact upon our next step. On August 31, 1971, the California State Supreme Court in a 6-to-1 decision held that the California system of financing public school education violated the equal protection provision of the 14th Amendment of the Federal Constitution. This landmark decision and the others that followed in late 1971 and 1972 were to have a decided effect in

*A photo-copy of a sample of the data display format for these runs is included in Appendix C.

determining which of the alternatives would be seriously considered. Although the Rhode Island Department of Education had originally addressed the problem of public school finance prior to the Serrano decision, this decision both reduced the necessity of considering as many different plans for distributing funds, and highlighted the necessity of considering the equity of the methods by which funds were raised.

The consideration of the equal protection argument, as it applies to education, necessitated an examination of the Rhode Island Constitution. One early analysis* of this issue by a staff member of the Research Section lead to the following conclusion:

> The Rhode Island Constitution places an injunction on all the people which should be heeded constantly.
>
> Section 1. The diffusion of knowledge, as well as of virtue, among the people, being essential to the preservation of their rights and liberties, it shall be the duty of the general assembly to promote public schools, and to adopt all means which they may deem necessary and proper to secure to the people the advantages and opportunities of education.
>
> Section 2. All free governments are instituted for the protection, safety and happiness of the people. All laws, therefore, should be made for the good of the whole; and the burdens of the state ought to be fairly distributed among its citizens.
>
> Two major problems, neither of which are intrinsically educational but have overriding political implications, have restricted the expansion of equal educational opportunities to all youth of Rhode Island. Hangovers from political decisions of the nineteenth century, they hamper the development of state educational policy and the sincere efforts of chief school administrators and dedicated school committees, who attempt to create meaningful educational experiences for youth who will spend their adulthood in the twenty-first century.

* Edward F. Wilcox, "Constitutional Considerations For School District Reorganization".

Solution of the problems of distributing the burden of supporting public education fairly among all the citizens of the state and creating school administrative areas in Rhode Island large enough to support a full, varied and complete educational program to meet the individual needs of all youth in an efficient and economic manner are major goals of the Board of Regents.

This document suggests the constitutional ground which might compel a state to create within its boundaries school districts which will act as the vehicles for meeting these goals. Constitutional considerations suggest that taxpayers or parents of school children may have a right to compel the state to create school government structures which will not by their very nature or size, deprive one group of a benefit accorded the other.

Interpretation of the Fourteenth Amendment suggests that states may be required to reorganize school districts because:

I Indirect Discrimination

The equal protection clause may be violated when a state creates school districts wherein the curricula in one district are less relevant to students' needs and experiences than another district or the teachers are less responsive to the student needs and inequalities of equal educational opportunity exist (for example, subject matter offerings and uniform texts.)

II School Committees and Voting Rights

If local school boards can be viewed as representing their electors in the working out of a state-wide legislative function, school district reapportionment may be constitutionally required. The legislature, having created a unique quasi-legislative state-wide elected forum for the development of the state's educational policy, is therefore bound to establish school districts of roughly equivalent population.

Because of the political sensitivity of the state toward even exploring the possibilities of the reorganization of school districts, as evidenced by the

Regents initial sally into this issue and the unwillingness of the Commissioner and other members of the Department to jeopardize the chances of public school fiscal reform by tying this concept directly to district reorganization, another course of action was selected. This course, which lead to The Proposal, is summarized in the next section.

IN-REVIEW

The Pre-Proposal Period, extending over the six months from the summer of 1971 until the winter, was characterized as the exploratory phase of this project. During this period new personnel were becoming acquainted with the operation of the Department, the issue of school finance, and each other; data resources were located and tapped; and events relating to this issue in other states were noted and commented upon by both those in and out of the educational profession. The stage was set.

THE PROPOSAL PERIOD

December 1971 - April 1972

The interest blossoming in Rhode Island on the school finance issue is typified in these excerpts from an editorial which appeared in the Providence Journal on December 8, 1971.

> Anger in Rhode Island over public school costs comes from placing these costs alongside the over-burdened local property tax. The mood we suspect, would change, if the rising costs were measured according to a much more substantial tax base, as, for instance, a state-wide equalized education tax.
>
> . . . . . .
>
> It isn't that poor localities are asking a concession from their rich neighbors in this situation; rather they seek mutual recognition of the right of equal opportunity.....for public education of high quality.
>
> Once a firm commitment is made to this purpose, then there is an opening for calm and intelligent debate over what should be elements of a fair formula for state-wide equalization tax.*

Against this backdrop a conference was planned by the Rhode Island Association of School Superintendents, the Curriculum Research and Development Center of the University of Rhode Island, and the State Department of Education for January 20, 1972 at the Quidnessett Country Club. The topic of the conference was "Alternative Financing of Education".

The Conference

In mid-December as the conference was planned, an impressive group of speakers was asked to appear, including nationally known figures as well as

*Providence Journal, December 8, 1971, page 62.

Rhode Islanders. Speaking to the issue of the national perspective on school finance were Senator Claiborne Pell of Rhode Island; Dr. John Ottina, U.S. Deputy Commissioner of Education for Mangaement; and Dr. Joel Berke*, then of the Brookings Institution in Washington. Dr. Fred G. Burke and Joseph Oakie, then the Vermont Commissioner of Education, were to represent the states' perspective and Philip W. Noel, at that time Mayor of Warwick and President of the Rhode Island League of Cities and Towns, was to speak as a chief executive of a city that applied state financing plans to a specific school budget.

The number of invited participants to this conference was reasonably small and included the superintendents of all forty school districts, the members of the Board of Regents, the presidents of the three state institutions of higher education, selected members of the State Department of Education, and a few selected guests. The total number in attendance was less than 80.

Commissioner Burke made the decision that he would take this opportunity to make a substantive speech, bringing several of his critical concerns for education together in a single presentation. He called upon the research staff to expand upon an idea for the support of public schools which had been taking shape out of the confused array of alternatives, and which had been altered in light of the court decisions.

When asked why he decided to surface this controversial proposal in this manner, Dr. Burke recounted that he had talked with his staff about the court decisions and was concerned about what might happen in Rhode Island if the

*It should be noted that Joel Berke is a friend and a former student of Commissioner Burke's in addition to being one of the nationally recognized experts in the field of school finance. His strongly held views on the necessity of establishing more equitable systems for public school support are well documented.

courts found our law unconstitutional, for we had made no provision to cope with that situation. He went on to explain, "this led to an attempt on my part to utilize my prior experience as a scholar to develop a position paper which would set forth the situation, as I saw it, which I considered a crisis. . . . The purpose was to bring the issue into the open."*

Christmas week, with its merriment and general laxity, slowed the project to a halt, but by the first week of the new year a document had been prepared by the Research Section entitled "Financing Public School Operations - Tentative Suggestions." The contents of this document included a brief recounting of the present status of the Rhode Island funding system for public schools in terms of equity and proposed alternatives for raising and distributing revenue for education. Within the revenue raising section the topics for discussion encompassed: total reliance on the income tax, implementation of a statewide property tax on all property, use of residential property tax alone to raise school funds from local sources, a shift from heavy reliance on local funds to a greater reliance on state revenue, removal of miscellaneous tax revenues distributed by the state to local communities, and a power equalizing proposal. Discussed under the distribution of revenues were the possibilities of funding according to student needs, using cost differentials based on pupil weightings and a per pupil grant scheme, and funding of special services directly from state sources (such as - transportation and professional salaries and benefits). The fiscal impact of each possibility was examined in terms of its effect upon the state and on seven sample districts chosen to reflect selected characteristics

*Taped interview of Dr. Burke by Robert Reutershan, June 6, 1973.

known to be crucial in school financing in Rhode Island. A majority of these suggestions were incorporated as one of the four sections of the Commissioner's speech, "Some Tentative Proposals for the Finance and Management of Education in Rhode Island."*

Commissioner Burke sent copies of the speech, which came from the press on the very morning of the conference, directly to Governor Licht and the members of the Board of Regents.

The Burke Plan for Statewide Funding

Before turning to a consideration of the impact of the statewide funding proposal, it is important to summarize the basic components of the plan, as it was first presented in public on January 20, 1972. Paraphrasing from an article that appeared in the Providence Evening Bulletin on that day, the Commissioner of Education's proposal (dubbed from the beginning as the "Burke Plan") would result in a "fundamental rebuilding of Rhode Island's structure for financing public school operations." In a set of suggestions with far reaching implications, it was proposed that the entire cost of public elementary and secondary school operations be borne equally by a new statewide property tax and an increased personal income tax. Dr. Burke advocated that the state establish a uniform salary scale for all teachers and administrators, handle all teacher contract negotiations and assume all costs of pupil transportation, and that the "weighted pupil" technique be used to distribute other funds. Rhode Island public schools receive nearly two-thirds of their support from local property taxes and approximately one third from the state (exclusive of federal support); the "Burke formula"

*"Some Tentative Proposals for the Finance and Management of Education in Rhode Island," Fred G. Burke, State Department of Education, January 20, 1972. Copy included in Supplementary Materials.

would revise these proportions so that the state shared the cost roughly 50-50 with local governments. The key to the proposal would be the new statewide property tax; the statewide levy would be a uniform rate applied to each city and town. The plan would mean sharp redirections in the local property tax rate for education - reductions of up to 40 percent in some communities, while property tax increases would occur in some of the more affluent cities and towns. The state personal income tax rate would rise from the present 15 percent of the federal income tax to more than 20 percent under this proposal, to raise the other half of the required funds.

Dr. Burke reviewed the present state formula for aiding school districts and noted that it was regarded as the third best system in the nation in terms of equalizing spending (NEFP assessment). However, he indicated that this was not good enough.

The Commissioner, speaking on the subject of school district regionalization, also suggested that school districts with less than 5,000 pupils "cannot effectively provide quality education" and that the Department might recommend consolidation of such districts over a period of several years.

The proposal, according to Dr. Burke, was designed to promote a "dialogue" across the whole range of Rhode Island's public school financial questions. He hoped such dialogue would lead to "a consensus for educational reform," which would encourage fundamental revisions in the state's educational finance laws by the General Assembly.

It is important to note that the same news article reported that the Commissioner had made clear that these proposals were his own responsibility, and

not those of the Board of Regents or the Department of Education. He did, however, credit the Department's researchers with helping to develop his data.*

This story, as it presented the facts to the public, was essentially accurate, a result facilitated by a news briefing for Brian Dickinson, the reporter, on the evening preceding the conference by Commissioner Burke and myself, and the reporter's presence at the conference.

The reception the Commissioner's speech received was one of cautious curiosity,and immediate interest was shown in the effects of the proposal upon individual districts, not just the seven used for illustrative purposes. The participants were informed that the development of a computer program to analyze the cost effects upon all districts was underway by the Division of Research, Planning, and Evaluation, and that these results would be distributed as soon as they were completed.

The predictable issues of local control and the problem of maintenance of "light-house" schools were raised during course of the questioning period. However, state education sources said firmly "that the plan should not be construed as an attempted power grasp or a move toward eliminating the voice of local school committees in school operations." From the beginning, one of the basic goals of the plan was to maintain all decision-making authority at the lowest level of management able to deal with whatever questions were raised.

*Providence Evening Bulletin, "Burke Suggests State Tax to Run Public Schools," - January 20, 1972, page 1, by-line - Brian Dickinson.

The dinner speaker at the conference, then Mayor of Warwick and now Governor Philip W. Noel, termed Dr. Burke's proposal a "courageous step" and said that the Rhode Island League of Cities and Towns should "stand with Dr. Burke and urge people to put aside resistance to change."

A headline in the evening paper of January 21, 1972 proclaimed "Burke Proposal Hailed by Noel; Other Politicians More Cautious."* Speaker of the House Joseph A. Bevilacqua declined to make an appraisal of the proposal until Governor Licht presented his special message on education to the General Assembly, while House Majority Leader Rep. Frederick Lippitt said that, though he favored the proposal in principle, he had not had enough time to study it in depth.

An editorial in the Providence Evening Bulletin on January 21, 1972, lauded the Commissioner for his "boldly imaginative proposal" and suggested that "the plan could be expected to generate opposition in some geographic and educational areas." It reminded the readers of the Board of Regents abortive attempt in 1970 to reach an acceptable stand on possible reorganization of school districts and suggested that total state assumption of school finance might well generate opposition based again on fear of the loss of local control of education.**

Another story in the Sunday paper of that same week again explained the basic component of the plan and quoted the Commissioner's comments. The final paragraph of this story stressed the point that Dr. Burke did not claim

* Providence Evening Bulletin, January 21, 1972.

**Providence Evening Bulletin, Editorial "Dr. Burke's Remedy," January 21, 1972, page 18.

that his paper should be taken as a definitive document, but rather that he had prepared it as a point of departure for discussion and that he acknowledged that more statistical work was needed before the full impact of the proposal could be evaluated.*

Another source of comments on the proposal was submitted to Dr. Burke on a personal basis by one district school board chairman. This assessment is an example of what many people were thinking, but few expressed openly, when the proposal was presented. Quoting directly from the text --

> F'rst let me say that this proposal exhibits the boldness and imagination that have become the hallmark of the Commissioner. I think it is a sincere, viable and provocative proposal and I am sure will generate much heat and I hope some light.
>
> History has shown that anyone who dares to introduce, espouse, extend, expand or in any way fool around with the income tax in Rhode Island -- no matter how real the need or how noble the cause -- has a very short public half life.

Many other problems were touched upon in this review, such as whether shifting the tax burden from property to income provides any relief, willingness of wealthy districts to help finance education across the state, necessity of providing some means whereby wealthy districts could spend more if they chose, and the question of the relationship between money spent and the quality of education. The total product was an insightful probe into the weaknesses and practical limitations of the plan.** Few others took either the time or the trouble to analyze the plan or to think through its implications.

* Providence Sunday Journal, "A Far-Reaching New Plan on Financing Schools," January 23, 1972, page G-4.

** Personal communication to Fred G. Burke.

However, the Department of Education was flooded with requests for the Commissioner's speech. The imposing length, some 59 pages in the complete text, made it difficult to have sufficient copies prepared quickly to meet the demand. As a partial solution to the problem of making the basic ideas of the plan available quickly, a single page fact sheet was compiled which contained a statement of the problem, the goals for the plan, and three alternative possibilities for both the distribution and raising of revenues for education. Rather than summarize the contents of this single sheet, a copy has been inserted in Appendix D. This sheet was produced in mass quantity the week after the proposal was presented and was distributed throughout the Spring of 1972 to people seeking information on the statewide funding proposal. Two printings of 500 copies each were made of this sheet and almost 1,000 copies have been distributed to people across the state.

There was no question that some people thought initiation of a concept as broad as this one on school finance was beyond the role of the Commissioner and should have been raised instead by the Board of Regents or the Governor. In his own words, the Commissioner refuted this charge. "My own feeling is that, in addition to the obligation laid down by the Board of Regents and those inherent in the Act (1969 Education Act), anyone charged with state education systems has the implicit responsibility to provide leadership to suggest alternatives to achieving certain ends."*

* Interview, op. cit., June 6, 1973.

When asked whether he would do it differently, if he had it to do over again, the Commissioner replied,

> I am not sure. I think the sequence of events and timing of the presentation of the paper might have been improved. The idea to me was utterly essential; it had to emerge; it had to surface. The time, I thought, was right for it, and I was convinced, as a professional, that educational reform in the state required this and I was searching for a way to surface this idea, so that it would become an issue in the state. I wanted to avoid taking a path which had any risk of it becoming aborted. Therefore, rather than developing a Department position, where some of the ideas might have been shot down as part of the management team process or of taking it to the Regents as a position paper seeking support, where there were very good chances that it would have been shot down despite the support it might have had elsewhere, the alternative was to find a platform. I thought the closed conference with the Regents invited might be a good time to explore this area. It got more publicity than I thought it might, which made it controversial. This may have had an effect upon my effectiveness, thereafter, with some of the members of the Board of Regents. But, conceivably, if I had it to do all over again, there might have been a better way, although at the moment, I cannot conceive of it -- to have my cake and eat it too.

Workshop on Financing Public School Education in Rhode Island

Stemming from an immediate reaction to the proposal voiced by Edward R. Martin, Chairman of the Rhode Island Association of School Superintendents, in his role as toastmaster at the Quidnessett meeting that the proposal "deserves some real study", the Department pledged to arrange a forum in which the proposal could be openingly discussed. At a meeting with Superintendent Martin during the last week in January, it was decided that a workshop should be held to provide the opportunity for people to learn more about the plan and express their opinions on its merits. Wednesday, April 5, 1972, was chosen as a date for the workshop which would allow the Department sufficient time to prepare explanatory materials and the cost analysis of the effect of the plan on each district, and which was compatible with school calendars.

The workshop was sponsored jointly by the Division of Educational Studies at Rhode Island College, which provided the meeting space and handled the technical arrangements, the Curriculum Research and Development Center of the University of Rhode Island, which paid the cost of the simulation activity, and the Rhode Island Association of School Superintendents which, through its newsletter, encouraged its members to attend. A steering committee composed of a representative from each of these groups, included: Dr. Jack L. Larsen, Rhode Island College, Dr. Robert W. MacMillan, University of Rhode Island, Superintendent Edward R. Martin, East Providence Public Schools, and myself, planned the program and assembled the invitation list.

Those invited to attend included superintendents, legislators, members of the Board of Regents, teacher organization representatives, municipal officials, college educators, citizens' groups, students, and others. From the 170 invitations that were sent, approximately 85 people attended the day long meeting.

In addition to a presentation of the plan by Dr. Burke and a panel discussion of the plan by individuals representing different interest groups, the major activity of the day was the use of a simulated computer exercise in which groups of participants, by group consensus, could select different variables and model their own finance programs. I personally was intrigued by the idea of using the gaming technique as a teaching device after having tried the NEFP simulation exercise at a meeting in Washington in November 1971, and after having observed the APEX Game, developed at Michigan State University. The realization that the already prepared computer program, which the Department was using to analyze the cost effect of the proposal would, with the insertion of a selection of different choices, provide an adequate vehicle for the game, gave me the incentive to pursue this idea. The result was the development of the Computer Simulation Exercise for Statewide Funding for Education, complete with a User's Manual, Input Decision Sheet, and Group Leaders' Manual. (See Supplementary Materials). Draft materials for the exercise were tried out with volunteers in a mock workshop for the Department, and resulting revisions were made.

During the week preceding the workshop, twelve group leaders were trained. Each of the leaders was responsible for guiding a randomly selected group of participants through each of the decision steps. The underlying theory behind this device was that if people were forced into defending a position on the issue in front of a group, they would be more interested in understanding the issue. Immediate feedback on the results was provided before the end of the workshop, when computer print-outs were made available for each group. The support of the personnel of the Rhode Island Junior College Resource Computer Center was essential, for to insure the success of the game, it was absolutely necessary to provide the participants with the results of their decisions.

The objectives of the workshop, which included -

1. to continue the dialogue in public school financing with the ultimate goal of evolving an improved plan for Rhode Island,
2. to involve the participants in the actual selection of alternatives and provide the opportunity for the participants to observe the results of their decisions,
3. to encourage the exchange of opinions between many different groups and individuals about the funding of education in Rhode Island in order to refine current thinking,

were reasonably well achieved, although the interest in the principles of the proposed plan were somewhat obfuscated by the release of the cost-effect data.

Participants at t workshop were each given a copy of the second document in the school finance series, "A Second Step Toward Statewide Funding for Rhode Island's Public Schools,"* developed by the Research Division.

*"A Second Step Toward Statewide Funding for Rhode Island's Public Schools," Rhode Island Department of Education, March 10, 1973. Copy included in Supplementary Materials.

In the report, the effect of the revenue raising and distribution plan on each of the forty districts was displayed both as absolute increases and decreases and as percentage changes. The press coverage of the evening of April 5th reflected this same logical interest. Front page coverage was given to the summary of the cost effects and a table displaying these effects was included,* while the story the next day covering the workshop** made only the back pages.

Contribution of Governor Licht

At the time the Commissioner originally made his proposal, many politicians declined to comment on the plan until after the Governor presented his education message. In January, when the State of the State message was given, Governor Licht chose to postpone his comments on education until he could prepare a special message. This special education message was presented on March 22, 1972. Prior to that date, the Department of Education had prepared for the Board of Regents for submission to the Governor a massive document entitled "Educational Accomplishments - 1971 - and Major Areas for Concern." Several separate drafts of possible comments on school financing prepared by different Department staff members were also forwarded to the Governor for consideration as a portion of his speech. Mr. Stevenson conferred directly with the Governor about the possibility of studying the financial program and extenuating problems, before any course of action was selected for support by the chief executive. It was from these discussions, and the subsequent phraseology

* Providence Evening Bulletin, "Plan Reduces School Taxes", April 5, 1972, page 1, by-line Carol J. Young.

**Providence Evening Bulletin, "Educators Workshop Discuss Burke Plan to Finance Schools", April 6, 1972, page 26, by-line Carol J. Young.

chosen by Mr. Stevenson, that the section on school finance was finally pieced together.

In his statement, Governor Licht reviewed the court decisions handed down in other states invalidating traditional school financing plans which did not provide for equal educational opportunities because they relied too heavily on widely varying local tax revenues. Citing a variety of studies and activities of commissions in other states and at the national level, the Governor made no mention of the comprehensive proposal for school fiscal reform suggested by Dr. Burke. Instead, Governor Licht called on his own for a wide public dialogue on school finance. He said, "There is no question but that Rhode Island, too, must become involved in this nationwide search for a more equitable method of financing public education. But I must stress that we have no reason to panic, no reason to rush helter-skelter into a new financial arrangement without the most thorough and complete review of objectives and possible alternatives." The Governor revealed his plan to submit legislation to create a 13 member Commission on School Finance "to thoroughly examine the intricate and interrelated problems of schools, people, and money." He added that the Regents could supply the required professional expertise from its staff and should participate in the decision-making process, but he said that "the complicated issue had ramifications far beyond the single area of education."* The Governor thus decided that the study should not be left entirely in the hands of the Department, perhaps because of the already

*Providence Evening Bulletin, "Licht Asks Education Cost Study," March 22, 1972, page 1,by-line Carol J. Young.

expressed bias toward a single possible solution. Instead, he preferred to widen the scope of the issue by using a specially selected group of individuals who could bring their own varied experiences and expertise to bear upon the problem.

The actual bill, "An Act Establishing A Special Commission To Study School Finance", was signed into law in April 1972. Provisions of the bill included a composition of 13 members; no compensation for members; technical, statistical, and secretarial assistance provided by the Board of Regents; and a reporting date on or before January 15, 1973. It was to be a low budget operation.

Providence Mayor Doorley Joins the Act

On March 27, 1972, Mayor Joseph A. Doorley, Jr. announced that the City of Providence would file a class action suit in the U. S. District Court to force the state to assume the full financing of local public school education. Named as defendants were the Attorney General, State Treasurer, Commissioner of Education (whose name was incorrectly given as Dr. Paul Burke), and the Board of Regents. The suit charged that the current state aid formula was unconstitutional because each community did not receive the same amount of state aid per pupil, and was supposedly modeled on the successful suits in California and Texas.

The Mayor said that his main reason for filing the suit was to push the General Assembly into enacting a statewide funding plan. Mayor Doorley admitted that he had not had time to study Dr. Burke's proposal and that he did not wish to wait for studies to be made on the question of school financing. "There is

no time for the taxpayers of Providence to depend on a study -- we are looking for action," he said in reaction to a comment on the bill introduced to establish the Governor's Commission on School Finance. However, Ronald Glantz, Assistant City Solicitor, one of the plaintiffs, was critical of the Burke Plan because under one interpretation of its provisions, the City of Providence would receive less money for education than was currently available.*

Commissioner Burke's reaction to the Providence suit was that he was "amazed that no taxpayers' group had done it before now." He went on to say that although Rhode Island's current method of financing education was one of the best in the nation in terms of the distribution of state funds on an equitable basis, it was still vulnerable to court action in view of the California and Texas rulings.**

The research staff secured a copy of the brief filed with the District Court and was prepared to collect the necessary data for the ensuing suit. The waiting on this count began.

Constitutional Status of the Rhode Island State Aid Formula

One pertinent question that bothered me from the start of the investigation of the question of school finance was the extent to which the lauded Rhode Island formula accomplished the stated objective of equality of funds distribution. The study of this question was undertaken, belatedly, when Robert Reutershan joined the staff. Logic would have dictated that this step

* Providence Journal, "Suit Asks State to Fund Schools," April 7, 1972, page 1, by-line George Bellerose.

**Providence Evening Bulletin, "Suit to Seek State Financing of R.I. Schools," March 28, 1972.

be the initial one in this investigation. The arrival in April of 1972 of the excellent study Comparative School Finance Data -- New England vs. California, by Steven Weiss and Deborah Driscoll of the Federal Reserve Bank of Boston, provided an excellent model on which to base the Rhode Island study.

The data requirements for this work included: property tax rates for education by district; state expenditures, local expenditures, and total expenditures per pupil by district; fiscal capacity (equalized full value of property) per pupil by district; and pupils in several categories (retarded, disadvantaged, etc.) by district. The data used were obtained from two sources: all data, with the exception of the tax rates and fiscal capacity per pupil, came from the 1970-1971 Statistical Tables published by the Department of Education; the remaining information was obtained from the Rhode Island Department of Community Affairs.

The completed study*, entitled "The Constitutional Status of the Present System of Financing Public Education in Rhode Island" showed that although Rhode Island's financing system was not as blatantly disequalizing as other state formulas, it still did not measure up to the goal of equalization. Disparities in the wealth of the districts and resulting differences in effective educational tax rates, guaranteed minimum state aid to wealthy districts, and unequal expenditures per pupil, all contributed to the questionable constitutionality of the Rhode Island system.

*"The Constitutional Status of the Present System of Financing Public Education in Rhode Island,"
Rhode Island Department of Education, June 26, 1972.

Transportation Study

Commissioner Burke, shortly after being appointed, began to consider a plan to utilize school buses during the hours when they ordinarily stand idle. Prompted by the fact that Rhode Island was found to be spending more per pupil on busing than any other state and that the 1969 Education Act specified school transportation as a responsibility of the Regents, the idea of a centralized pupil transport system, and even expanding it to include other groups, was appealing. In February, 1972, an ad hoc committee was formed composed of representatives from several state departments and agencies and chaired by Henry W. Stevenson, Jr. A consultant was hired to draw up a plan of action and the ensuing report, "Rhode Island Comprehensive Plan for Statewide Transportation for School and Community Transportation Services"*, was the result.

The report described how the state might achieve the three specific objectives of 1) improving the efficiency and reducing the costs of school transportation, 2) using school buses where feasible to reduce costs of services offered by other state agencies, and 3) merging transportation services, if feasible, into one statewide agency. The approach could be implemented by 1975 and was estimated to cost 1.3 million dollars, which represents a 25 percent saving over estimated project costs based on current trends.

The results of the study and the original ideas were compatible with the provision in the statewide funding proposal to have the state assume the entire cost of school transportation. The total cost of 5.5 million in 1972 for school

*"Rhode Island Comprehensive Plan for Statewide Transportation for School and Community Transportation Services," Final Report to the Ad Hoc Committee on Transportation, Concord Research Corporation, June 1972.

transportation would go far in defraying the cost of the enlarged system.

IN-REVIEW

The proposal for statewide funding, as advanced by Commissioner Burke, was hailed as exciting and innovative as it burst upon the scene at the beginning of the 1972 New Year. The Regents failed to publicly comment on the proposal and privately condemned the Commissioner's presumptuous behavior for not having cleared the idea with them before going public. On the hill, the Governor chose to appoint his own Commission to study the problem and not to seek another term. The legislature passed a bill on the final evening of the session providing for a dual method of counting pupils in average daily membership for inclusion in the state aid formula (just public school pupils or public and non-public school pupils); districts received the entitlement from whichever method resulted in the greater amount of funds. The Providence suit became lost in the halls of justice.

Summer came, Rhode Islanders went to the beaches, the Department assumed its summer routine, and the school finance problem was reduced, at least temporarily, to a smoldering spark.

POST-PROPOSAL PERIOD

September 1972 - To Date

The Fall of 1972 saw several events that were to impact both directly and somewhat obtusely on the school finance question. Being an even numbered year, 1972 was an election year for Governor in Rhode Island, and two new contenders were in the field. The Governor's Commission on School Finance began its deliberations and many schools could not open because of teacher strikes. Public interest in education was generated, but not in the form of support.

The Election and School Finance

Mayor Philip W. Noel of Warwick, the Democratic gubernatorial candidate, was pited against Herbert F. DeSimone. DeSimone, narrowly defeated by Governor Licht in 1968 on the basis of the income tax issue, was considered to be a strong candidate both because of the sympathy vote due to the infliction of the state income tax, after Licht had campaigned on a no income tax platform, and because it looked like a Republican year in Rhode Island. John Chaffee's attempt to unseat Senator Claiborne Pell was a strong challenge, and Nixon looked to be the stronger of the two presidential choices, even in a state where Democratic voters outnumbered Republicans two to one.

Mayor Noel, early in the campaign, identified the school finance issue as a place to recommend reform. From the outset, dating as far back as the Quidness tt meeting, the Mayor supported the concepts voiced in the Burke proposal. His friendship with the Commissioner and their personal contact helped to keep his interest in this question from expiring.

In September 1972, Mayor Noel revealed his nine-point education program. The program called in part for an expanded Board of Regents, the regionalization of schools, the revision of the present system of financing education, and a statewide teacher salary scale. In the area of finance the Mayor said that "even if the courts do not require a change, one must be made, because the present system is unfair and ultimately self-defeating." He called the real estate tax "the most unjust we have," and declared, "I make a firm commitment today that I will do everything in my power to see that the present system is replaced with one that is fair to all our people."*

The emphasis in Mayor Noel's program was placed on his proposal for regionalization, as evidenced by the title of the article reporting his comments. It seemed at the time like a politically suicidal move, but perhaps because it was tempered with the idea that control of curriculum remain locally determined, the regionalization question did not develop as a major political issue. In November, Philip W. Noel was elected the 52nd Governor of Rhode Island.

Teacher Strikes - Fall 1972

When schools were slated to open in September 1972, there were 2,500 teachers in nine districts on strike and 50,000 children unable to attend school. Mayor Doorley of Providence, one of the strike besieged communities, was quoted as saying, "The next legislature and next governor should start with the implementation of a statewide school system by first moving with a statewide teacher salary structure." When asked about the strike situation,

*Providence Evening Bulletin, "Noel Urges School Regionalization With Local Autonomy," September 21, 1972, page 1..

Commissioner Burke cited three fundamental problems facing education, which he said could no longer be separated 1) relief for the local property tax by reforming school finance, 2) federal judiciary's concern for equalizing pupil expenditures between districts which can only be accomplished if salary scales are equalized, and 3) finding a better process for reaching contract settlements with the state's teaching force.

Dr. Burke took action to see that these problems received attention. The services of Dr. Charles T. Schmidt, Jr., Associate Professor of Industrial Relations at the University of Rhode Island, and an experienced practitioner in labor relations and arbitration, were retained. Dr. Schmidt, in conjunction with the Commissioner's staff, was assigned the task of developing proposals dealing with the issue of public sector collective bargaining, particularly in reference to public education. A report* was drafted which explored the basic problems and proposed recommendations for change.

The initial Schmidt report was returned by the Regents to the Department. The concern was that the recommendations contained therein were too far-reaching; the recommendations made were not restricted to public education employees, but encompassed all employees in the public domain. Some Board members felt the scope of the report should be narrowed, and to meet their request, a second draft with the same title was issued in March. This draft reflected the changes the Regents sought.

The importance of this report on the proposal for full state funding

*"Collective Bargaining in Rhode Island Public Education - A Framework for Legislative Change," Rhode Island Department of Education, January 23, 1973.

was apparent in the reactions of the teachers' organizations. At a public hearing scheduled by the Regents to discuss the report, the two teachers' groups were adamant in expressing their objections to the recommendations for the imposition of fiscal penalities in return for the right to strike, and also voiced their opposition to the proposal that teachers across the state be paid according to a single salary schedule.

The Regents took no definitive action on the report, and although parts of it were submitted in the form of legislation during the 1973 Session, none of these related bills were passed. The proposals included in the report represented another set of innovative ideas backed by the Commissioner which did not reach fruition, at least not on this first try.

Governor's Commission on School Finance

Although the legislation establishing the Governor's Commission on School Finance was passed in April, it was not until September that the Governor made all of his appointments. The bill specified that eight of the members be appointed by the governor, two by the lieutenant governor, and three by the speaker of the house; an added stipulation was that at least one appointment be made from the Board of Regents. When finally selected, the composition of the Commission included, in addition to the chairman, the state budget officer, a city mayor, a city finance director, a retired school administrator, a school board member, a housewife, three state representatives, two state senators, and a Board of Regents member.

The first meeting of the Commission was held on October 24, 1972, and was attended by eight of the thirteen-member group. As according to the mandate, the Department of Education provided staff support for the

Commission and, as an initial task, provided a kit of reference materials to the members at the first meeting. From the beginning, the Department staff was instrumental in assisting the Commission in making decisions relative to the scope of and procedures for the study, as well as serving as an information source and making necessary arrangements for the meetings.

By the beginning of December and their fifth meeting, the Commission had made some basic decisions as to its modus operandi and the general scope of the study. At the beginning of the new year it became apparent that the Commission would not have a report prepared for the Governor by January 15th, and an extension of the deadline was requested and granted for March 15th.

The Commission continued to meet regularly, if with sparse attendance, without formulating any specific goals or establishing any firm deadlines. The agenda tended to emerge from one meeting to the next, rather than to develop according to a logically derived plan. The few faithfully attending members, who numbered approximately five, and the two Department staff members who attended the meetings established an easy, congenial, if not very productive, working relationship.

As the March deadline approached, the Commission decided that it wanted to ensure that allowance had been made for all interested parties to present their cases. As a result, arrangements were made for an open hearing on school finances to be held on March 28th and, concurrently, a second request for an extension of the reporting date to June 15 was made. The hearing marked the nineteenth meeting of the Commission and included presentations by representatives of nine different groups, some of whom took this chance to speak before the Commission for the second time. The presentations for

the most part were predictable. Those groups making presentations included --

Rhode Island Federation of Teachers

League of Women Voters

Rhode Island Education Association

Rhode Island Association of School Superintendents

Mt. Pleasant Parents and Citizens Council

Rhode Island Association of School Committees

Rhode Island Public Expenditure Council

Project Rhode Island

Pawtucket - Blackstone Valley Chamber of Commerce

The Commission followed the hearing by an all day work session specifically intended to draw a larger number of members than the usual core group, and to confront a specific agenda. The meeting began at 9:00 a.m., and was adjourned at 4:20 p.m. and, according to the minutes, "no decisions were reached."

By the end of May and the twentieth meeting, the chairman expressed the hope that the members would reach "sufficient agreement on some basic points discussed to submit, at least, an interim report to the Governor in the near future." But this hope was not realized and on June 15th the chairman spoke with Governor Noel and secured an extension on the reporting date until October 1, 1973.

In an attempt to precipitate some decisions on the part of the Commission which could be couched in terms of recommendations for change, the Department staff prepared a document for Commission review. Working

from the minutes of the meetings, the testimonies from the public hearing, and from personnel recollection, a series of alternatives were drafted, based upon the issues that the Commission had considered and discussed. Each of the alternatives was presented with accompanying arguments. At this writing, the Commission had just reveived the document. (See Supplementary Materials for a copy.) After reviewing the list of alternatives, the Commission members are to select those alternatives they feel should be included in the final report, and which of the arguments they would like to see expanded as support for their recommendations. Presuming that the members usually in attendance can reach agreement, a draft of the final report will be written and submitted to all members. Any member who chooses may take exception to the proposed recommendations, and those divergent points of view will be considered before the final report is drafted.

Viewing the proceedings of the Commission, one would observe a high level of dedication on the part of the attending members, but an inability to confront the complex problem they face with any concept of how to resolve it, especially within the political realities of the situation. The chairman's basic complaint about the Commission was the "make-up" of the membership; he felt that more people familiar with the area of financing would have been useful. He also expressed concern for the fact that the Commission was not really organized, but instead, "everybody was looking into everything." If he could start again today, he would break the group into sections and make each sub-group responsible for a portion of the issue.*

*Taped interview with Thomas H. Belcher by Robert Reutershan, June 1, 1973.

Trying to anticipate the impact of the Commission's report, once it is completed, is difficult. Since the group was appointed under one governor and must report to another, its recommendations may not be readily accepted. The Commission probably has also diminished its effectiveness by the constant postponement of their report. The press has taken notice of each extension and has duly reported the perpetual low attendance and lack of productive results at meetings.

When asked what he anticipated the reaction to the Commission's report might be, Dr. Burke expressed the opinion that if the Commission's recommendations were along the lines of the statewide funding proposal, this would be a boon to the Department's stand. He characterized the Commission as being composed of people who are generally respected and who have worked hard on the problem. He concluded that since most investigators who have studied this problem have eventually recommended some form of statewide funding, he assumed that the Commission also is likely to do so. Because of Governor Noel's expressed preference for a statewide plan, the Commissioner believes that the Department's plan, the Commission's report, and the Governor's preference may well reinforce one another and thereby increase the chances of change along the lines he favors.*

Management Team Reviews the Plan

Due to the speed with which the original proposal on statewide funding was prepared, the Department's Management Team (composed of the associate, assistant, and deputy commissioners) was never briefed on the plan, as a group. Therefore, prior to the presentation to the Regents of the

*Interview, op. cit., June 6, 1973.

newest work prepared by the Division of Research, Planning, and Evaluation on implementation steps* and a summary of the recommendations for change, a presentation was prepared for the Management Team.

The development of the implementation plan was the result of the integration of previous data and ideas, and up-dated figures on the plan's fiscal impact calculated for FY 1973. Throughout the fall, the research staff collected estimates on expenditures and personnel data required to rerun the impact effect program. Insertion of the most recent figures resulted in the production of values which were more meaningful to the reader then those which were dated by almost two years.

Meeting with the Management Team on January 12, 1973, the research staff was subjected to searching questions concerning both the implementation steps and the underlying assumptions of the total proposal. The meeting was a good dry-run preparation for the presentation to the Regents.

Regents Receive the Plan

Under the existing legislation governing state aid to local school districts, there is a provision (P.L. 16-7-33) which directs the Commissioner to "make a continuous evaluation of the operations of 16-7-15 to 16-7-34 inclusive" (the state aid formula for school operations), and to make a report to the Board of Regents on the findings, "at least once every two years."

*"Possible Implementation Steps for the Proposed Rhode Island Full State Funding Plan for Public Elementary and Secondary Education," Rhode Island Department of Education, December 29, 1972.

The Board in turn is required to make recommendations to the Governor and the General Assembly. Not since Commissioner Burke assumed his present position had a report on the state aid formula been prepared.

Consequently, it was decided that this mandate could provide the opportunity whereby the proposal for statewide funding could be placed before the Regents, with the subsequent possibility that the Regents might pass the recommendations on to the Governor and the General Assembly with or, perhaps, even without their endorsement. By December 26, 1972, a report entitled "Rhode Island State Financial Support for Public Elementary and Secondary Schools: Recommendations for Change," was prepared by the staff of the Division of Research, Planning, and Evaluation. The report included two recommendations for technical changes in a 1972 amendment to the state aid formula and a final broad recommendation that the Board consider the Department's proposal for statewide funding as a replacement to the currently used formula.

At their January 18, 1973 meeting, the Regents chose to narrow the scope of the review report by separating the two considerations; as a result, two reports evolved from the first. The resubmitted version of that portion of the initial report which described the technical changes was accepted by the Regents at their late January meeting. The recommendations for full state funding were expanded into another report*, which was prepared for the February 1st meeting. The document was marked

*"Proposed Recommendations: Rhode Island Full State Funding Plan for Public Elementary and Secondary Education," Rhode Island Department of Education, January 23, 1973. Copy included in Supplementary Materials.

"Draft" and summarized in five pages of simple prose the intent and the basic components of the proposal. Presentation of the report to the Regents was accompanied by the implementation plan which was completed in late December. Both documents represented the culmination of ideas and concepts which had been refined over the previous year, since Dr. Burke advanced his original proposal.

In presenting the documents to the Regents, Dr. Burke acknowledged that the alternatives were being advanced at the request of the Governor and that the Commissioner hoped that the Regents would look favorably on the concept. The reaction, according to the newspaper account,* was predictable.

> The Regents, who consistently have resisted public association with the commissioner's financing ideas in the past, shied away from them again yesterday.
>
> Referring to the fact that the board had not received the plan until a day or two before the meeting and also the the board's heavy agenda yesterday, Robert A. Riesman, chairman, suggested a "work session" soon to examine the proposals in detail. Then it could be decided whether the plan is "ready" for board action, he said.

For the work session, which was scheduled for the morning prior to the regular Board meeting on February 15th, additional information was requested by the Regents. The explanation of the latest computer generated information on the district fiscal impact of the plan, which was

*Providence Journal, "Regents Receive Financing Plan," February 2, 1973, page 1, by-line Carol J. Young.

already in preparation, met one of these requests.* The second request, by former Governor Dennis J. Roberts, was for a description of alternatives in addition to the Commissioner's proposal. Mr. Roberts, during the course of the February 1st meeting, criticized Dr. Burke for presenting a "smattering of information," which he claimed only confused people. Another document, "Analysis of Alternative Proposals for Funding Elementary and Secondary Public School Operations - A Working Document," February 8, 1973, was prepared to meet this request. This report examined three alternatives: increasing the minimum guaranteed percentage in the state aid formula to 35 percent, inclusion of the weighted pupil concept in the present state aid formula, and a power equalizing proposal.

From the meeting on January 18th, the Regents did state that they agreed with the principles behind the move to change the present funding system. Mr. Roberts remarked that he recognized the need to provide equal educational opportunities and that he was aware of the great pressure to relieve the property tax burden.

The work session with the Board centered on their concerns with the recommendations advanced in the Commissioner's proposal for full state funding. Two and a half hours were spent by the Department staff (Commissioner Burke, Assistant Commissioner Stevenson and myself) responding to questions. No definitive conclusions were reached and no action was taken.

Eventually, the Board did decide to express a point of view on

*"Rhode Island Full State Funding Plan: Analysis of Estimated Costs - A Working Document," Rhode Island Department of Education, February 2, 1973. See Supplementary Materials for copy.

the finance question. In late March, after the Rodriguez decision, the Chairman, Robert A. Riesman,asked Assistant Commissioner Nelson F. Ashline to draft a resolution for the Board encompassing the principle of equal educational opportunity, as this principle related to school financing.* The resulting resolution directed the Commissioner and his staff to take all measures necessary to implement a plan to provide equal opportunity to students throughout the state.

Aftermath of Rodriguez

In March 1973, the U.S. Supreme Court ruled against the plaintiffs in the Rodriguez case and one of the strongest arguments for changing the Rhode Island system of public school finance was defused. The supporters of change immediately responded that they were disappointed with the decision, but stated that it would not alter their course of action. Governor Noel said that "the decision seems to remove the pressure for immediate action," but that he "still intended to seek reform."** The Commissioner expressed his concern and stated, "I am still convinced that fiscal reform in education has to come before we can really bring about qualitative changes that have to be realized."**

One problem always present when discussing reform of the Rhode Island school finance system is the superior quality of the present system.

*Resolution, April 5, 1973. Copy included in Appendix G.

**Providence Journal, "Reform Still Goal Despite Ruling," March 22, 1973, page 1.

Frequently, the question raised is why, if the Rhode Island system is so good, should a change be made? The unfavorable court decision removed an easy answer to the question of "why". Instead of relying on the support of a court ruling, the arguments for change must now be based on logic which will appeal to the politicians and the constituents they represent. The task thus became more difficult than it originally appeared.

A New Board of Regents

As one of his campaign issues, Governor Noel proposed that the Board of Regents be expanded to 21 members. Early in the 1973 Session, the powerful majority leader in the Senate, John P. Hawkins, suggested that the responsibility for the governance of public education should be vested in the hands of a professional staff headed by a commissioner. Commissioner Burke also expressed his opinion on the Board to whom he was responsible. In January, he issued a fourteen page statement on governance in which he recommended an increase in the size of the nine member Board. After receiving the Commissioner's report, the Board approved a motion by Dennis J. Roberts which called for a "reexamination of the existing power-authority relationship between the Regents, the Commissioner, and the presidents of the three state institutions of higher education.* At their February 15th meeting the Board approved a measure that greatly reduced the Commissioner's duties and responsibilities in respect to higher education and vested considerably more power with the presidents of the three institutions.

*Providence Journal, "Commissioner Urges Larger Regents Board," January 1, 1973, page 1, by-line Carol J. Young.

By April, the Governor's bill overhauling the Board of Regents was submitted to the Legislature. The provisions of the bill abolished the existing nine-member board and replaced it with a fifteen member board which would operate sometimes as a whole and sometimes as sub-boards responsible for three separate areas: post-secondary education, elementary and secondary education, and special populations. Instead of the then current provision which permitted the Board to determine the duties and powers of the commissioner, the new legislation delineated a relatively long list of specific responsibilities for the commissioner.

The Regents were quick and devastating in their attack on the proposed bill. The chairman, Robert A. Riesman, while speaking to the Rhode Island Association of School Superintendents, asserted that the effect of the legislation would be to elevate the commissioner of education to a powerful position of unbounded control over the state's educational enterprise and would reduce the governing board to an "advisory unit" which would function as a "rubber stamp for a commissioner."* Mr. Riesman assured the superintendents that the ultimate effect of the bill would be to establish a single, statewide school district, which would have full state funding. At a press conference at the end of the same week, Mr. Riesman publicly declared that the selection of Dr. Burke as Commissioner of Education ranked as one of the Board's "major errors."**

*Providence Sunday Journal, "Noel Measure Attacked by Riesman," April 15, 1973, page B-12, by-line Carol J. Young.

**Providence Journal, "Selecting Burke Called 'Error' By Regent Chief," April 20, 1973, page 1, by-line Carol J. Young.

On May 5th, in the small hours of the morning of the final day of the 1973 Legislative Session, the new regents bill was passed. A new Board of Regents was to replace the old, and the Commissioner of Education was in a far stronger position than ever before. Governor Noel, when speaking about the new bill, reaffirmed his opinion that leadership for educational change must come from the Board of Regents. He noted that one of the controversies between Commissioner Burke and some of the old board members erupted over suggestions for educational reform. The Governor stated, "When he (Commissioner Burke) would come out with some new concept and some new ideas - you know, just laying them out in public for discussion and to trigger some dialogue and some thinking - some of the Regents seemed to reject that approach."* The full state funding proposal was the most obvious example of an issue raised which matches this description. One side effect of the fiscal study was the part that it played in drastically altering the pattern of educational governance in Rhode Island.

The Present

At this writing, the new Board of Regents has just held their first meeting. Much of the time and attention in the Department of Education over the last two months has been directed towards establishing the best operative mode to meet the anticipated demands of the new board. A revised internal departmental organization has been conceptualized and new positions and job responsibilities are now being assumed. The

*Evening Bulletin, "Regents: Best People," May 24, 1973, page 1, by-line Charles Bakst.

immediate effect of these changes has been to slacken progress in specific program areas, partly because many decisions must await the attention of the new board.

When asked how he intended to broach the subject of reform in school finance with the new Regents, Commissioner Burke replied that he would begin by reviewing the entire problem area. Then, as with the previous board, he plans to suggest a course of action which involves a statewide funding approach. Hopefully, he concludes, the Regents will support the proposal so that it can be forwarded to the Governor and General Assembly as a plan for change. The anticipated game plan is essentially the same, only the players are different.

IN REVIEW

Throughout most of the post-proposal period, the attention of the Department of Education has been focused on more immediately pressing problems that the financing issue. While the effect of the Supreme Court ruling in Rodriguez certainly contributed to making public school financing a less critical area of concern, the reorganization of the state's educational policy-making board was also a considerable distraction. However, Department staff members are frequently called upon to discuss the financing issue (for example, contributions of the staff to the forum on educational financing sponsored by the Rhode Island Chamber of Commerce, see Appendix K), to provide continued assistance to the Governor's Commission on School Finance, and to supply information for others interested in this problem.

As the new Board of Regents decides what responsibility for change in this area they will assume and the Governor clarifies his intentions on the implementation of the general concepts for reform that he has enunciated, the Department's role and future contributions will become increasingly clear.

TIME-LINE FOR SCHOOL FINANCE STUDY

DATE	MAJOR EVENT
June 1968	Final Report of the Commission to Study the Entire Field of Education
May 1969	Education Act of 1969 became law
Sept. 1969	Appointment of Board of Regents
April May 1970	Public hearings held on school district regionalization
Jan. 1971	State income tax legislation passed, first for Rhode Island
Jan. 1971	Fred G. Burke assumed duties as Rhode Island Commissioner of Education
Jan. 1971	Henry W. Stevenson, Jr. hired as Assistant Commissioner for Research, Planning and Evaluation
April 1971	New Patterns For Public Education in Rhode Island Englehardt & Englehardt, presented to Board of Regents
July Dec. 1971	Collection of data to test alternative funding methods undertaken
Aug. 1971	Proposed modifications to state aid formula drafted
Nov. 1971	Preparation of cost estimates for different alternatives using 1970-71 figures
Dec. 1971	Regents considered reducing state aid to schools by one percent to prevent deficiency in state educational budget
Jan. 1972	Teacher Salary Study prepared by the Division of Research, Planning and Evaluation, R. I. Department of Education
Jan. 1972	Financing Public School Operations -- Tentative Suggestions, prepared for Commissioner Burke by the Division of Research, Planning and Evaluation
Jan. 1972	Some Tentative Proposals for the Finance and Management of Education in Rhode Island, presented by Commissioner Burke at the Quidnesset conference

DATE	MAJOR EVENT
Feb. 1972	Regents sent letter to General Assembly indicating their recommendation for no change in the number of school districts in the state
March 1972	Governor Licht presented "Special Message on Education to the General Assembly," which announced his intention to seek a Governor's Commission on School Finance
March 1972	Announcement by Governor Frank Licht that he would not seek a third term
March 1972	Statewide Funding for Education Computer Simulation Exercise User's Manual developed by the Division of Research, Planning and Evaluation, R. I. Department of Education
March 1972	A Second Step Toward Statewide Funding for Rhode Island's Public Schools prepared by the Division of Research, Planning and Evaluation, R. I. Department of Education
April 1972	Workshop on School Finance held at Rhode Island College
April 1972 Jan. 1973	Refinements of the statewide funding proposal (weights, special allocations, phasing) developed by the Division of Research, Planning and Evaluation, R. I. Department of Education
June 1972	Rhode Island Comprehensive Plan for School and Community Transportation Services prepared by the Concord Research Corporation
June 1972	The Constitutional Status of the Present System of Financing Public Education in Rhode Island prepared by the Division of Research, Planning and Evaluation, R. I. Department of Education
Sept. 1972	Appointment of Governor's Commission on School Finance
Nov. 1972	Teacher Salary-Fringe Benefit Survey made of school districts by the Division of Research, Planning and Evaluation, R. I. Department of Education

DATE	MAJOR EVENT
Nov. 1972	Collection of data on 1972-73 estimated expenditures by the Bureau of Educational Statistics, Division of Research, Planning and Evaluation, R. I. Department of Education
Dec. 1972	U. S. O. E. grant for Fiscal Sub-Committee Study of the Management Information System
Dec. 1972	Possible Implementation Steps for The Proposed Rhode Island Full State Funding Plan for Public Elementary and Secondary Education prepared by the Division of Research, Planning and Evaluation, R. I. Department of Education
Jan. 1973	Trends in Public Day School Expenditures 1962-63 -- 1971-72 Revised, prepared for the Governor's Commission on School Finance by the Division of Research, Planning and Evaluation, R. I. Department of Education
Jan. 1973	Inauguration of Philip W. Noel as Governor of Rhode Island
Feb. 1973	Work session held with the Board of Regents to explain the statewide funding plan
Feb. 1973	Analysis of Alternative Proposals for Funding Elementary and Secondary Public School Operations -- A Working Document prepared by the Division of Research, Planning and Evaluation, R. I. Department of Education
Feb. 1973	Rhode Island Full State Funding Plan, Analysis of Estimated Costs - A Working Document prepared by the Division of Research, Planning and Evaluation, R. I. Department of Education
Feb. 1973	Regents vote to dilute Commissioner's power over three institutions of higher learning by vesting more power in presidents of the institutions
March 1973	Collective Bargaining In Rhode Island Public Education - A Framework for Legislative Change - Working Document prepared by Charles T. Schmidt, Consultant to the Department of Education

DATE	MAJOR EVENT
March 1973	The Effects of Early Retirement of Teachers - A Working Document prepared for the Management Team of the Department of Education by the Division of Research, Planning and Evaluation
April 1973	Regents pass"Resolution on School Finance"
May 1973	Passage of the new Board of Regents Bill which expanded the size of the Board and altered its power
May 1973	Chamber of Commerce Workshop
June 1973	Selection and confirmation by the Senate of a fifteen member Board of Regents

ANALYSIS OF SCHOOL FINANCE STUDY

GENERAL MISSION

> Therefore, even in the absence of substantial fiscal realignments, the Board desires that the educational practices in the Department of Education and agencies under its control and influence should reflect its belief that true equality in the treatment of students can be achieved only through recognition of the inherent differences in their individual needs and through the design and provision of educational programs that meet these needs.
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> Resolution
> Board of Regents
> April 1973

The basic problems to be confronted in the study of school financing were those of equity and adequacy. Equity for both the receivers and providers of educational services in Rhode Island and adequacy for the welfare of the entire state, as well as for the benefit of those individuals who comprise that state, are essential elements of any fiscal plan. The purpose of state aid to education has always been to provide supplemental resources deemed necessary to protect the citizens from ignorance, to provide an intelligent and well trained labor force, and to provide some common experiences for all children. To accomplish these ends, the state constitution makes the implicit guarantee that each child, irrespective of where he or she lives in the state, should have the same opportunity as that of every other child for an education which will best fit him/her for life. How to achieve this desired outcome of equity is one of the key factors in the current debate.

The other half of the question rests upon the problems of the interrelationship among governments, institutions, and people, and the responsibility each has to support, foster, and nurture education. For both constitutional and practical reasons, the state bears a prime responsibility for designing, supporting, and supervising educational practices. Out of choice, the state has transferred to the local districts the function of providing adequate education and districts, as creatures of the state, have no choice but to accept. In the interest of adequacy, the present practice of raising money in support of education, with a high reliance on what many consider to be a most regressive tax, the property tax, is subject to review. In the interest of equality, taxpayers, too, must be afforded fair treatment when the burden for support of education is applied through the taxing structure.

Sharply mounting costs in education have revealed weaknesses in both the adequacies and equities in the present school finance system. Adequacy usually is discussed in the context of the "taxpayer rebellion" while the equity question has drawn national attention through numerous court cases and the work of many governmental study commissions.

MAJOR ISSUES

Initially, the study on school finance was narrowed in scope to encompass only the question of the raising and distributing of funds for public elementary and secondary schools. The intended objectives for the study were clearly delineated in Commissioner Burke's first address. These objectives have continued to represent the basic goals of the project.

Objectives for Finance Plan

1. To provide equal educational opportunities to all pupils with similar characteristics and needs.

2. To achieve fiscal neutrality in the collection of revenues, so that this burden is distributed equitably throughout the state, based upon the ability to pay--not place of residence.

3. To maintain all decision-making authority at the lowest level of management able to resolve the questions.

As the study and the discussions progressed, it became obvious that school operations could not and should not be supported by a system which made no provisions for capital expenditures. As an adjunct to the original study, therefore, an investigation was undertaken, just recently, to develop a corresponding and complementary proposal for a capital improvement plan. The objectives of this study are identical to those of the school operations study.

Closely aligned with the studies on school finance were investigations into the possibility of initiating a comprehensive statewide school and community transportation system, establishment of a single salary schedule for Rhode Island teachers, and the institution of uniform statewide collective bargaining practices. All of these studies obviously have implications for any statewide funding proposals.

The firm possibility exists that the scope of the funding studies may be widened by having this question subsumed into a project of greater proportions. The recent announcement by the Governor of the establishment of a task force, charged with the responsibility of studying general tax reform, holds evident consequences for school finance reform. The recommendations of this group will undoubtedly include some reference to the school finance question.

CONSTRAINTS

The major difficulties in conducting the school finance study were analogous to the constraints which operate in almost any study undertaken by the Rhode Island Department of Education or any other state department. Simply stated, the problems can be reduced to two types: insufficient resources, which includes time, trained personnel, and data requirements; and insufficient understanding of the problem by those who must eventually make decisions.

The time devoted to the school finance study, although substantial, was always sandwiched between the prevailing crises of the day, until one deadline or another propelled it to crisis proportions. Since the original summer's work on the project, little opportunity has occurred to rethink the project in its entirety. This is not to say that the project has proceeded without critical review. However, the real soul-searching that should constantly accompany the development of a proposal of this magnitude has not happened since the beginning, and it may be past due.

The personnel involved in this project were as competent and thorough as their training, experience and common sense allowed, but there were obvious gaps in their backgrounds which should have been supplemented by additional personnel. The interrelations between what has been suggested as a statewide funding proposal for education and the funding of other state and local functions should have been tested throughout the formulation period by someone with intimate and practical knowledge in this area. The idea that any type of legislation can be prepared even in draft form without the assistance of a lawyer familiar with the complexities of funding plans and Rhode Island general law is unrealistic.

Someone with these qualifications will not be easy to find but these services must be secured to assist the department staff. When a study on school finance reaches the point that it is to be aired to numbers of people outside the educational sphere, persons trained in the science of preparing technical materials for public consumption should be drawn into the project. The techniques well known in the advertising world should be adopted, as appropriate, to produce materials which are eye-catching and readable. Such are examples of the personnel problems confronting a small department which attempted a large task.

The difficulty and time consumption of gathering reliable data must occupy a place at the top of the list of constraints. The frustration of attempting to secure what sometimes appears to be trivial pieces of information is sometimes disheartening. Much of the required data for this study had to be collected from the local districts. Because of the high degree of autonomy now exercised by these districts, it was often maddening to try to pry loose from them what was needed. With the Management Information System for Rhode Island now in the development stage, in the relatively near future this problem may solve itself.

One of the draw-backs of the present state aid formula is that so few people understand just how it works. Although it is not a very difficult exercise to explain the formula in mathematical terms, all but a very few people are stopped by the first algebraic equation. As a consequence, whenever one begins a presentation of the contemplated changes by trying to explain the inadequacies of the present formula, the discussion frequently becomes diverted into a discussion of the calculation of the state share ratio, etc., and the

audience is lost. If this discussion is purposely avoided, the question of why it was not presented is often raised.

Along these same lines is the problem of trying to convince people to consider changing from a plan that they do not understand to another with which they also have some difficulty grasping. Evidently in Oregon, the opposition to the proposed funding plan used the slogan, "If you are confused, vote No," and the same type of reasoning is well underway in Rhode Island. In an effort to inform the public about the basic intent of the statewide funding proposal, Commissioner Burke, Assistant Commissioner Stevenson, and myself have accepted a large number of speaking engagements to groups of all sizes to present the description of the plan. Armed with a set of transparencies, a stack of fact sheets, and the conviction that change is needed, we have tried to spread the message. In all, probably over thirty different groups have been addressed, and invitations are still being received weekly. It is extremely important that we articulate the need for change, for if change is to occur it must be understood.

The presentation of proposals on the topic of funding is further complicated by the unwillingness of so many people to even consider the theoretical intent or basis of the plan, but instead to concentrate exclusively on the immediate impact upon his pocket-book or his community. Dealing with money matters restricts too many persons' vision to only the here and now, and legislators seem to be the most prone to this type of reasoning.

ORGANIZATION AND PROCEDURES

The Rhode Island Department of Education is a small and closely knit group which can tackle a task that cuts across divisional lines without becoming mired in the formalities which often plague larger institutions. The procedures followed in the finance study are a good example of the type of cooperative effort which is typical of our flexibly structured organization.

Much of the preliminary work on the statewide funding proposal, once the basic idea was expressed, developed out of informal brain-storming sessions. Commissioner Burke, Assistant Commissioner Stevenson and I discussed and debated how best to process the idea, in order to produce a plan that would contain the agreed upon essential elements and also have basic appeal to the varied publics interested in school finance. Once the components were selected, the Division of Research, Planning, and Evaluation was assigned the task of compiling and analyzing the available data, so that the fiscal impact of the plan could be estimated.

To secure data on district school expenditures, the assistance of R. Richard Joyce, the Supervisor of Statistical Services, was sought. From his tightly run shop, Dick cajoles and threatens local districts into submitting on time reasonable figures on what they spend for education. Good naturedly, he ably assisted in this project by relaying, as soon as the figures were available, all the information on expenditures that were needed for the analyses.

Even before he became a paid member of the staff, Robert A. Reutershan proved his interest and usefulness to the project by expressing both enthusiasm and well-reasoned criticism of the proposal. His participation in tasks that ran the gamut from menial to partaking in decision formulating sessions attended

by the Commissioner, testify to a versatility that is so necessary in small organizations.

From the Division of Regulatory Services assistance was secured from Stewart R. Essex, who for many years has overseen the dollar determinations of state aid share to local districts. Stewart patiently explained the intricacies of the state aid formula and from his logically and neatly arranged filing system provided data on past trends. The Teacher Certification Office, also in Regulatory Services, made available information on teacher characteristics which is collected annually by questionnaire; this information was the basis for the Teacher Salary Study.*

Outside the Department of Education, data were secured on the equalized weighted assessed valuation, used in the state aid formula, from the Department of Community Affairs. Charles B. Munsch, Supervisor of Tax Equalization, took the necessary time, which was not incidental, to explain to staff members working on the project the methods used to derive these figures for each of the 39 Rhode Island cities and towns. The Computer Resource Center at Rhode Island Junior College assumed the responsibility for writing the computer programs to perform the desired analyses and to generate the reports. Innumerable consultations between Louis Rabinowitz, Program Analyst, and myself were necessary to successfully produce the programs which were used to test the impact of the different modifications of the state aid formula and the statewide funding proposal. The Computer Resource Center was also invaluable in helping to prepare the computer simulation exercise for use at the workshop and for subsequent runs.

*"Teacher Salary Study," Rhode Island Department of Education, January 24, 1972 (See Supplementary Materials.)

DATA COLLECTION

Although the "Chronicle of Events" Section of this paper specifies what types of data were collected for the analysis of the statewide funding proposal, this information appears in narrative form and is scattered throughout the section. Therefore, to assist the reader interested in an overview of the data gathered, Table II was prepared as a summary and indicates in addition to the type of data collected, the source of the data, and the appropriate appendix in which a copy of the collection form or a sample report is located.

TABLE II

DATA COLLECTION FOR STATEWIDE FUNDING STUDY

Data	Source	Appendix
School Expenditures by Districts	Form 31 R. I. Department of Education	A
Teacher Characteristics 1970-71	Annual Teacher Data Record R. I. Department of Education	B
Equalized Full Valuation by Communities	R. I. Department of Community Affairs	H
Teacher Characteristics 1972-73	Form developed by Research Section R. I. Department of Education	I
Estimated School Expenditures by District	Fall Form I & E R. I. Department of Education	J

The factual data, once secured,were used to estimate the cost of implementing the proposed statewide funding plan and to compare these costs with the actual costs of the present system. The first cost analysis, which was undertaken in the Fall of 1971, was based upon figures of actual expenditures for FY71. To reduce errors of estimate, the costs of statewide funding were also calculated for FY 71. The question being addressed was the one - what would it have cost if the statewide funding system had been in operation in 1970-71? The calculated cost estimates were then compared with the actual costs and the dollar differences and the percentage changes were reported. The reporting format described the changes for each of the forty school districts and the state for both the monies to be raised and spent for education. (See Appendix F for an example of the data display.)

In the Fall of 1972 it was decided that before the statewide funding proposal was pursued further, more up-to-date figures would be required. Especially if the proposal were to be submitted as a piece of legislation for the 1973 Session of the General Assembly, it would be imperative to have available the most reliable cost figures.

Each fall, the school districts submit to the Department an estimate of the school expenditures for that year. The form used to collect this information is very similar to the form used to collect the actual data on expenditures at the close of the school year. (For a copy of Form I and E, see Appendix J). These estimated data on school expenditures for 1972-73, plus information gathered from each district from a special survey on teacher characteristics in November 1972, (see Appendix I) were used to run a second

cost estimate for FY 1973.

The same computer program, and thereby the same type of report as was generated the previous year, was prepared. A report was compiled using 1972-73 data incorporating the computer printed analysis sheets, reduced in size, directly into the text, thus reducing typing costs and the introduction of errors through transcription. A clear description of the significance of each of the columns of figures prefaced the introduction of the figures. The report, "Rhode Island Full State Funding Plan - Analysis of Estimated Costs - A Working Document"* was prepared for the work session with the Board of Regents and is an example of the data display and analysis prepared to present the cost impact of the proposed plan for statewide funding.

It has become clear from our experience that the presentation of the cost effect of any proposed fiscal plan is essential, if the plan is to be taken seriously. The problem, however, of presenting this information in a clear format with a readily intelligible commentary is a formidable task, expecially when only limited funds are available.

EVALUATION OF TOTAL EFFORT

Suitably, the analysis of a study on school finance should begin with an accounting of the cost of the project. The largest share of the resources devoted to this project, of course, have been in terms of personnel time. The figures which have been prepared are estimates since, unfortunately no continuous log was kept of the staff time expended on the project. Other costs have been estimated or, if the records were available, the actual costs are reported.

*Copy is included in the Supplementary Materials.

Only primary costs to the Department are included in this accounting; no consideration has been given to the secondary costs entailed by presenting the statewide funding plan for discussion, such as the manhours of time people have devoted to learning about and debating the merits of the proposal.

TABLE III

Estimated Costs of Statewide Funding Study

	FY 1972	FY 1973
Personnel Costs*		
Professional Staff	$ 16,500	$ 10,300
Secretarial Staff	3,700	1,600
Printing Costs	1,800	700
Computer Costs	6,000	2,500
Travel Costs	700	500
Mailing and Telephone Costs	900	400
TOTAL	$ 29,600	$ 16,000

* Figures include overhead costs.

The fiscal resources necessary to complete the study should be evaluated both in respect to what has been accomplished in the study and what other studies might have been completed, if the available resources had been directed to those ends. The first of these tasks is clearly easier to attempt than the second.

Reviewing the accomplishments of just under two years of attention to school finance reform, 3,500 man/woman hours of work, and the expenditure of $45,600 of state funds, it is comforting to be reminded of the lag-time that is required to bring about any changes in education. For now after two years, on the surface no obvious changes have occurred. The state's share of expenditures for elementary and secondary education are still determined by basically the same formula used since 1960, no bills proposing radical changes in the formula were introduced in the General Assembly's 1973 Session, no report has been forthcoming from the Governor's Commission on School Finance, and the summer slump is again on the school finance study for the second time.

The accomplishments which can be enumerated to reduce this dismal picture are less tangible but may eventually, if one can be optimistic, have a far greater impact. On the positive side of the ledger, during the past two years the Department has trained at least two additional people with sufficient grounding in the present state aid systems to be able to respond knowledgeably, when questions are raised about its operation. Beside a better understanding of the present system the staff is now far better prepared to respond to questions about possible alternate proposals and modifications. The computer program developed for the statewide funding alternatives has sufficient

flexibility so that a wide range of variations on the basic proposal can be tested for cost impact. To test these possibilities, one need only to vary the submitted data, rather than write a new program or completely revise the current one. The speed and ease with which the impact can be calculated for all the school districts has been and will continue to be a great time saver.

By developing the capacity not only to generate new ideas, but also to be able to back these ideas with concrete estimates of the impact effects, the Department of Education has enhanced its image as a "doing" as well as a "thinking" department. The recognition given the Department by the U. S. O. E. Task Force on School Finance and by the number of other state departments and individuals seeking information on our study have reinforced this image. In the highly competitive situation in which Education must vie with other state agencies for support, the image building or boosting potential of the work undertaken cannot be forgotten.

One of the most prominent stated objectives of the school finance study was the initiation of a "dialogue" on school finance with the Department assuming the lead in the orchestration of the discussion. In this we have been successful, for whatever discussion is now undertaken around the state on school finance almost always includes some member of the staff as one of the invited participants. This was, perhaps, always the case when school finance was a topic for public forums, but these discussions seem more numerous since the proposal on statewide funding was presented. Over the last year and a half, it is estimated that the staff in the Department have accepted at least thirty invitations to speak on the subject of school finance and have spoken

before a minimum of 2,000 people. By providing staff to assist the Governor's Commission on School Finance, the Department has had another avenue for advocating its position on statewide funding. Taking the lead at an early point assured that the Department's particular view toward school finance reform would be given at least equal air time with any proposals that follow.

If one of the hidden agenda items of the proposal for statewide funding was to help topple the then present Board of Regents, the idea was successful in accomplishing the desired result. The manner in which the proposal was surfaced was an announcement to the Regents that Dr. Burke viewed his role as one of initiation and educational leadership, not as an administrator whose sole purpose was to respond to the wishes of the Board. No other single event raised nearly the same degree of personal animosity toward the Commissioner by the Regents, particularly Dennis J. Roberts, as the issue of fiscal reform. Repeatedly, Mr. Roberts would refer to this event, not only in private, but publicly as well, as an example of a case where Commissioner Burke over-stepped his authority. At the height of the politicking on the new Regents bill, Mr. Riesman, then Chairman of the Board of Regents, declared that the selection of Dr. Burke as Commissioner ranked as one of the "major errors" of the Board. This feeling stemmed, at least in part, from the Commissioner's personal and close association with the funding proposal and the generally accepted assessment both within and outside the state that the proposal was an exciting innovative approach to the problem.

As for tasks left undone, so that staff time could be directed toward the school finance study, one can only speculate on what could have been more important. Judging from the general tenor of feeling about what the Department is accomplishing, expressed by those on the outside, the subjects which surface most often are the statewide testing program and teacher certification. Either

directly or indirectly the proposed statewide system for funding schools with its emphasis on a single uniform salary schedule and the provision for accountability practices impinges upon these areas. It may well be the most efficient move to settle the basic question of financing first, so that it can serve as the foundation on which further reforms can be built. Additional modifications to the funding scheme can be instituted, as newer reforms dictate.

NEW ISSUES RAISED

The school finance study has brought forth some issues, which although not entirely new, can now at least be viewed in a new light and from a new perspective. Some of these issues are very fundamental ones to the entire operation of the State Department of Education and others are specific to the funding problem. At this writing, few of these issues have been resolved and some have not even been directly addressed. Many will only be evaluated if the statewide proposal or an adaptation of it is tested in actuality.

Issues Related to the School Finance Study

* What is the role of the Commissioner of Education in respect to the formulation of education policy and practices?

* Which agency, the local districts, the Board of Regents, the Legislature or the Governor, shall determine the level of educational expenditures for public elementary and secondary education?

* Can the upward spiralling of educational costs be slowed by placing the decisions on expenditure levels at the state level?

* Does public interest in education diminish if the funding source is centralized?

* Can the imposition of ceilings on spending and limitations on number of teachers be imposed without seriously altering the quality of education?

* Is it politically feasible to increase the income tax in Rhode Island to support education?

* If property taxes in support of education are reduced, will other locally funded services increase to fill the void?

* What approaches can be developed for districts which are "abnormal", such as Block Island, to ensure equal treatment for taxation and for distributing funds in accordance with the inflated cost of living?

* To what extent can communities be permitted to "overspend" a statewide determined level of expenditure without seriously mitigating the equality principle?

* Are the figures provided by the R. I. Department of Community Affairs on full property valuation a fair representation of relative school district wealth?

* With single statewide negotiations for teachers, would the teacher organization become all powerful and be able to secure exorbitant salaries and benefits?

* If school committees were relieved of the responsibilities of negotiating teacher contracts and reviewing school budgets would they spend more time on educational issues? Corollary: Under the circumstances of statewide funding, would a different type of person be attracted to school committee positions?

* Can school districts be held accountable for the job they perform and can funds be distributed on the basis of proven accountability?

* How unequal is the present Rhode Island system in providing equivalent opportunities to students with similar interests and needs?

* What difference does it make, if students are not given the same educational opportunities in terms of both their personal satisfaction while in school and their chances for success as adults?

IN RETROSPECT

If we could do it all over again, what would we do differently? -- An intriguing question, and one which can only be answered upon the premise that the other factors in the system would remain essentially unchanged. The actors, the setting, and all the action, save the moves in the fiscal study, would be the same.

Under these circumstances, at the outset of the project more professional staff members should have been brought aboard who were competent to assess the fiscal attributes of the state and to draw upon their expertise to formulate an education revenue raising plan which would be compatible with the current tax structure. Enlarging the group of persons responsible for developing the original plan with trained personnel from other departments within the state, expert consultants, and knowledgeable lay people who could work together as a task force or an advisory committee would have been one way to supplement the talents available within the Department. This procedure would also have resulted in a larger cadre of people familiar with the intent of the plan to serve as resources for interest stimulation with different groups. The plan, very likely then, would not have assumed the personal character implied by the title "The Burke Plan," though whether this is an asset or a liability is still to be determined.

Another essential change which would have furthered the course of school finance reform would have been to have introduced by this time a legislative bill incorporating the major considerations of the statewide funding. Because of the Governor's expressed interest in the concept of statewide funding, 1973 would have been a good year to have legislation submitted in this area. A new Governor often enjoys a certain honeymoon period with the legislature, and the

statewide funding plan will need the most favorable climate to secure acceptance. Next year being an election year, does not appear to be a propitious time to introduce legislation which will alter the tax structure, especially if it results in an increase in state taxes. If the Department had been able to secure the backing of the Board of Regents and if it had had available the services of a capable drafter of bills, a piece of appropriate legislation could have been submitted in 1973. Whether this legislation would have passed is certainly open to question, but it would have served well as a way to test the flavor of the political climate to a proposal at this time and to assess what changes and compromises would be necessary to construct a successful bill. With this information available, an assessment could be made of what price would be required for passage of a bill in 1974.

The capital funding proposal from the very beginning should have been an integral part of the statewide funding proposal. It is difficult to deal with the funding of school operations without referring to how capital expenditures would be treated. The press of time when developing the original proposal made it difficult to confront the capital question at the same time, but the integrated approach would have resulted in a stronger plan to be presented to the public.

Although these changes would have strengthened the chances of implementing educational fiscal reform along the lines suggested by the statewide funding proposal, what has been done to date is impressive when measured against the personnel and fiscal resources available for this study. Looking forward to the future, we are hopeful that these efforts will eventually come to fruition, and that Rhode Island will retain its envious position as a leader in the field of public school financial plans which excel in equity.

APPENDIX A

Form 31

Public School Finance Reporting Form

Submitted Annually by School Districts
to the Rhode Island Department of Education
on or before July 31st.

FORM "A"

State of Rhode Island
Department of Education

PUBLIC SCHOOL FINANCE

Town
City
Report for J. . , 19 . . to June 30, 19 . .

A. — REVENUES

FEDERAL

1.	National Defense Education Act	
	a. Title III (Science, Mathematics and Modern Foreign Languages)	$ . . . . .
	b. Title V (Testing, Guidance, and Counseling)	. . . . .
	c. Title VII (Area Vocational Educational Programs)	. . . . .
2.	Vocational Education Act of 1968	. . . . .
3.	Other (DESCRIBE)	. . . . .
4.	Other (DESCRIBE)	. . . . .
5.	Other (DESCRIBE)	. . . . .
6.	Elementary and Secondary Education Act of 1965	
	a. Title I	(. . . . .)
	b. Title II	(. . . . .)
	c. Title III	(. . . . .)
	d. Title VI	(. . . . .)
7.	Public Law 815	(. . . . .)
8.	Public Law 874	. . . . .
9.	Other (DESCRIBE)	. . . . .
10.	Total Federal Aid (EXCLUDE AMOUNTS WITHIN PARENTHESES)	$ . . . . .

STATE

11.	State Share of Public School Housing	$(. . . . .)
12.	State Share of Public School Operations	. . . . .
13.	Area Vocational Coordinators	. . . . .
14.	Section IV - Disadvantaged	. . . . .
15.	Section V - Handicapped	. . . . .
16.	Other (DESCRIBE)	. . . . .
17.	Total State Aid (EXCLUDE AMOUNTS WITHIN PARENTHESES)	$ . . . . .

TOWN OR CITY

18.	General Appropriation	$ . . . . .
19.	Special Appropriation	. . . . .
20.	Income from School Funds	. . . . .
21.	Tuitions	. . . . .
22.	Other (DESCRIBE)	. . . . .
23.	Total from Town or City	$ . . . . .

24.	Total Revenue from all Sources (10+17+23)	$ . . . . .
25.	Balance of school money on hand from preceding year	$ . . . . .
26.	Other balances from preceding year (Building funds and others not included in item 25)	$ . . . . .
27.	Whole amount available for all purposes	$ . . . . .

B. — EXPENDITURES

ALL SCHOOLS	Salaries	Supplies and Expenses	Total
1. Expenses of General Control (overhead charges)			
1. School Committee and Clerk's office			
2. Office in charge of supplies, books, etc.			
3. Superintendent of schools and his office			
(a) Superintendent of schools			
(b) Clerical assistants			
4. Deputy/Assistant Superintendents and their offices			
(a) Deputy/Assistant superintendents			
(b) Clerical assistants			
4A. Office of Business Administration			
(a) Business Manager			
(b) Clerical assistants			
5. Supervision of attendance enforcement:			
(a) Attendance Offs/Social Wkrs.			
(b) School Census			
6. Other expenses of general control (Explain).			
(a)			
(b)			
(c)			
7. Total of General Control			

PLEASE COMPARE THE SALARIES OF THE INSTRUCTIONAL STAFF WITH THE APPROPRIATE CERTIFIED PERSONNEL INCLUDED ON FORM 30A.

		Kinder-garten	Middle and/or Elementary Schools (Indicate Grades) (1-___)	Secondary Schools (Indicate Grades) (___)-(___)	Special Education	Vocational Education	Total
	II Instruction						
8	Salaries of Supervisors/Directors/Consultants of grades and subjects						
9	Salaries of Principals						
9A	Salaries of Assistant Principals						
10	Salaries of Classroom Teachers						
11	Salaries of School Librarians						
12	Salaries of Guidance Counselors/Deans						
	III [illegible] Plant						
	[illegible]						
2*	Water						
3*	[illegible]						
4*	[illegible]						
5*	[illegible]						
27	Other expenses of operation						
	[illegible]						
	IV Maintenance of School Plant						
	[illegible]						
29	Upkeep of grounds						
	[illegible]						
31	Repair and replacements of equipment						
	(a) Repair of equipment						
	(b) Educational equipment						
	(c) Furniture						
32	Other expenses of maintenance						
33	Total expenses of Maintenance						

*Include personnel responsible for supervising plant operational staff servicing buildings or plants and for the care of grounds as well as the salaries of custodians, firemen, matrons, general utility men, night watchmen, sweepers and cleaners, switchboard operators, truck drivers, supervisors of warehouses, stock clerks and any other plant operational personnel whose salaries cannot be charged to other sections of the FORM 31. (SEE 600 SERIES OF USOE HANDBOOK II).

[illegible]Include salaries of carpenters, painters, plumbers, electricians, groundskeepers, and similar personnel engaged in the maintenance of the school plant. (SEE 700 SERIES OF USOE HANDBOOK II).

SPECIAL NOTICE: Subsequent to the printing of this page, the USOE advises us that "SECURITY GUARDS" are to be included with the salaries of the plant operational personnel; i.e., Line 21 above.

	Kinder-garden	Middle and/or Elementary Schools (Indicate Grades) (1-___)	Secondary Schools (Indicate Grades) (___)-(___)	Special Education	Vocational Education	Total
V. Fixed Charges						
34. Insurance						
(a) Fire						
(b) Liability						
(c) Workmen's Compensation						
(d) Other (Explain)						
(e) Other (Explain)						
35. Rent for Land and Buildings						
36. Other Expenses						
(a) Survivors' Benefits						
(b) Certificated Personnel Retirement						
(c) Non-Certificated Personnel Retirement						
(d) FICA (Social Security)						
(e) Blue Cross						
(f) Major Medical						
(g) R. I. Group Health						
(h) Life Insurance						
(i) Other (Explain)						
(j) Other (Explain)						
(k) Other (Explain)						
37. Total for Fixed Charges						
VI. Auxiliary Agencies						
38. Promotion of Health						
(a) Medical inspection						
(b) Dental inspection						
(c) School nurses						
(d) Dental clinic						
(e) Expenses						
39. Transportation of pupils						
(a) Salaries						
(b) Supplies and expenses						
(c) Contractual services						
(d) Crossing Guards/Junior Police						
40. Provision of lunches						
41. Community lectures						
42. Social centers						
43. Recreation						
44. Payments (tuition) to private schools						
45. Payments (tuition) to other towns						
46. Other auxiliary agencies and sundry activities						
47. Total for Auxiliary Agencies						

EXPENDITURES FOR PUBLIC EVENING SCHOOLS

VII. Evening Schools						
48. Salaries of supervisors of grades and subjects						
49. Salaries of principals						
50. Salaries of teachers						
51. Expenses of supervisors						
52. Salaries of principals' clerks and assistants						
53. Other expenses of principals' offices						
54. Textbooks						
55. Supplies used in instruction						
56. Tuition paid						
57. Other expenses of instruction						
58. Wages of janitors						
59. Other expenses of operation						
60. Total for Evening Schools						

	Kinder-garten	Middle and/or Elementary Schools (Indicate Grades) (1-__)	Secondary Schools (Indicate Grades) (____)-(____)	Special Education	Vocational Schools	Total
VIII Summer Schools						
61 Salaries of superintendents, principals, grade and subject supervisors						
62 Salaries of principals						
63 Salaries of teachers						
64 Salaries of clerks and assistants						
65 Textbooks						
66 Supplies used in instruction						
67 Tuition paid						
68 Other expenses of instruction						
69 Wages of janitors						
70 Other expenses of operation						
71 Total for Summer Schools						
IX Capital Outlays. Note indicate by stars amounts expended from building funds or other special funds						
72 Sites						
73 New buildings						
74 Additions to buildings						
75 Improvements to buildings						
76 Equipment (not replacements) (a) School library books (b) Laboratory equipment, furniture and fixtures						
(c) Mechanical equipment						
77 School busses						
78 Other expenses of capital outlay						
79 Total for Capital Outlays						

C.—SUMMARY OF CURRENT EXPENDITURES

80 General Control (item 7)	$
81 Instruction (item 59)	
82 Operation of School Plant (item 70)	
83 Maintenance of School Plant (item 33)	
84 Fixed Charges (item 37)	
85 Auxiliary Agencies (item 47)	
86 Total current expenditure for support of day schools (items 80 to 85)	
87 Total current expenditure for support of evening schools (item 60)	
88 Total current expenditure for support of summer schools (item 71)	
89 Total current expenditure from school revenues for capital outlays (unstarred items in IX)	
90 Total current expenditure from school revenues (sum of items 86 to 89)	
91 Unexpended balance of school revenues	
92 Total current expenditure from building funds and from other funds not included in item 90	
93 Unexpended balance of building funds and other funds the balances of which are not given in item 91	
94 Current expenditure for the year for support per capita of average membership of schools (item 86 divided by average membership for year)	

Statistical statement certified to the Commissioner of Education for the School Committee of

By *Official position*

Date

RHODE ISLAND STATE DEPARTMENT OF EDUCATION

PUBLIC SCHOOL EXPENDITURES
FORM 31-SUPPLEMENT E

JULY 1, 19____ TO JUNE 30, 19____ CITY OR TOWN_____

DIRECTIONS: RECORD ON SEPARATE PAGES A DETAILED ACCOUNTING OF ALL EXPENDITURES IN THE CATEGORIES LISTED BELOW. THIS ACCOUNTING SHOULD BE SUFFICIENTLY DETAILED TO INDICATE CLEARLY THE PURPOSES FOR WHICH THE MONEY WAS EXPENDED. RETURN TO THE COMMISSIONER OF EDUCATION WITH FORM 31.

I. GENERAL CONTROL
6. OTHER EXPENSES OF GENERAL CONTROL

II. INSTRUCTION
13. OTHER EXPENSES OF SUPERVISORS
15. OTHER EXPENSES OF PRINCIPALS' OFFICE
19. OTHER EXPENSES OF INSTRUCTION

III. OPERATION OF SCHOOL PLANT
21. SALARIES OF JANITORS AND OTHER EMPLOYEES
LIST THE CLASSIFICATIONS OF EMPLOYEES WITH THE AMOUNTS EXPENDED IN EACH CLASSIFICATION.

IV. MAINTENANCE OF SCHOOL PLANT
29. UPKEEP OF GROUNDS
30. REPAIR OF BUILDINGS
32. OTHER EXPENSES OF MAINTENANCE

V. FIXED CHARGES
36. OTHER EXPENSES

VI. AUXILIARY AGENCIES
46. OTHER AUXILIARY AGENCIES AND SUNDRY ACTIVITIES

VII. EVENING SCHOOLS
59. OTHER EXPENSES OF OPERATION

VIII. SUMMER SCHOOLS
68. OTHER EXPENSES OF INSTRUCTION
70. OTHER EXPENSES OF OPERATION

IX. CAPITAL OUTLAYS
78. OTHER EXPENSES OF CAPITAL OUTLAY

NOTE: IN EACH SEPARATE CATEGORY THE TOTAL OF THE EXPENDITURES LISTED IN THIS SUPPLEMENTARY REPORT MUST EQUAL THE AMOUNT LISTED ON THE RESPECTIVE LINES ON FORM 31.

BY _____ TOWN OF _____
SUPERINTENDENT OF SCHOOLS

FORM 31-SUPPLEMENT N
JULY 1, 19____ TO JUNE 30, 19____

REPORT HERE REVENUES AND EXPENDITURES NOT TREATED AS PART OF THE REGULAR SCHOOL BUDGET AND NOT APPEARING ON FORM 31

(NOT ALL ITEMS WILL BE IDENTICAL FOR ALL COMMUNITIES. IF AN ITEM LISTED BELOW IS A PART OF YOUR REGULAR SCHOOL BUDGET, AND, THEREFORE, REPORTED ON FORM 31, DO NOT REPORT IT AGAIN HERE.)

GENERAL RULE: IF FUNDS ARE HANDLED THROUGH THE SCHOOL COMMITTEE, REPORT ON FORM 31. IF NOT HANDLED THROUGH THE SCHOOL COMMITTEE REPORT HERE.

REVENUES:

CAFETERIA RECEIPTS.....$_____
MILK RECEIPTS..... _____
RECREATION AND ATHLETIC RECEIPTS..... _____
TOTAL.....$_____

EXPENDITURES:

SCHOOL COMMITTEE SALARIES.....$_____
SCHOOL COMMITTEE EXPENSES..... _____
AUDITING OF SCHOOL ACOUNTS..... _____
INSURANCE (FIRE AND LIABILITY)..... _____
WORKMEN'S COMPENSATION..... _____
COST OF BONDING SCHOOL EMPLOYEES, THEFT AND OTHER..... _____
COMMUNITY'S SHARE OF TEACHERS' PENSION FUND..... _____
SOCIAL SECURITY TAXES..... _____
OTHER (EXPLAIN)..... _____
TOTAL.....$_____

DO NOT INCLUDE ANYWHERE:

PRINCIPAL PAYMENTS FOR THE COST OF SCHOOL BUILDINGS
DEBT SERVICE ON THE COST OF SCHOOL BUILDINGS
PENSIONS OF FORMER SCHOOL DEPARTMENT EMPLOYEES

RECEIVED BY COMMISSIONER OF EDUCATION _____

RHODE ISLAND STATE DEPARTMENT OF EDUCATION

PUBLIC SCHOOL EXPENDITURES
FORM 31--SUPPLEMENT PS

July 1, 19__ to June 30, 19__ City or Town_____

1. Do you pay TUITION to PRIVATE SCHOOLS?
   (Answer YES or NO) _____

2. If your answer is NO, return this supplement with the Form 31.
   If your answer is YES, complete A & B below and return with the Form 31.

   A. Number of RESIDENTS OF YOUR DISTRICT for whom you pay the above TUITION to PRIVATE Schools. _____

   B. Average Daily Attendance (ADA) of Line A above. _____

PUBLIC SCHOOL FINANCE
FORM 31-SUPPLEMENT R

July 1, 19___ to June 30, 19___ City or Town_____

REVENUES

21. Tuitions

A. Day School

1. Paid by Other School Districts $_____

2. Paid by Individuals (How many pupils _____) _____

B. Evening Schools _____

C. Summer Schools _____

TOTAL* $_____

22. Other Revenues

Detail below by sources all "Other Revenues" reported. These must include all receipts from whatever source which are applied toward the expenditures reported on Form 31. Do not include receipts which are applied to expenditures not reported on Form 31. Report these on the supplementary report provided for such receipts and expenditures.

1. Receipts (local) for food services including milk $_____

2. _____ _____

3. Receipts for athletics _____

4. Receipts (other than tuition) for adult education classes _____

5. Receipts (other than tuition) for summer school _____

6. Receipts for rental of school buildings, buses, equipment, etc. _____

7. Receipts from the sale of school equipment, books, supplies, etc. Include payments for items lost or damaged _____

8. Receipts for service rendered, such as custodial service, bus drivers, cafeteria personnel, etc. _____

9. _____ _____

10. _____ _____

11. _____ _____

12. _____ _____

TOTAL* $

APPENDIX B

Annual Teacher Data Record

Submitted Annually by All Professional Personnel
in Public Elementary and Secondary Schools
to the Rhode Island Department of Education

STATE OF RHODE ISLAND AND PROVIDENCE PLANTATIONS
DEPARTMENT OF EDUCATION
ROGER WILLIAMS BUILDING
HAYES STREET, PROVIDENCE, R. I. 02908

ANNUAL TEACHER DATA RECORD

PLEASE PRINT CORRECTIONS IF NECESSARY — OR COMPLETE IF BLANK

CERTIFICATE NUMBER
1-6

NAME
7-21

DATE

ADDRESS

SOC. SEC. NUMBER
24-32

CITY/STATE/ZIP

SCHOOL/COMM.
33-36

NOTE: DO NOT FILL IN ANY SHADED BOX — USE CORRESPONDING LINE FOR ANSWER

1. Your highest degree is:

		Check one
None	1	
Bachelors	2	
Bach. + 30	3	
Masters	4	
Mast. + 30	5	
Doctorate	6	

37

2. Semester hours earned during past year? (Number) ____ 38-39
Send course cards to certification office, State Agency for Elementary and Secondary Education, Hayes St., Providence, R. I. 02908. So courses can be added to record.

3. Marital status: (Check One)

Single	1	
Married	2	
Divorced	3	
Separated	4	
Widowed	5	

40

4. Have you ever been employed as a teacher before? (Check One) Yes / No — 41

5. If answer is yes, where did you teach last year? (Answer All)

	Yes	No	
In Rhode Island			42
In same district			43
In same school			44
In public school			45
In private school			46
In parochial school			47
In another state			48
Did not teach			49

6. This year are you teaching full-time? (Check One) Yes / No — 50

7. What is the highest grade you are teaching or supervising? If all or none, so indicate. ____ 51-52

8. What subjects are you teaching? (Subject Names) Elementary grade teachers will write elementary. Other teachers will name subjects taught. Administrators will give title.
A. ____ 53-54
B. ____ 55-56
C. ____ 57-58

9. Are your duties more than one-half administrative? (Check One) Yes / No — 59

10. Are you a department head? (Check One) If yes, of what dept? ____ Yes / No — 60 — 61-6

11. What is your basic contract salary? $ ____ 63-67

12. Are you employed by more than one school district? If yes, name them. Yes / No — 68
A. ____ 69-7
B. ____ 71-7
C. ____ 73-7

APPENDIX C

Sample Data Display

Computer Analysis of the Cost of Alternatives

to the State Aid Formula

1970-71 Data

Sample Page

RHODE ISLAND STATE DEPARTMENT OF EDUCATION
DIVISION OF RESEARCH AND PLANNING

MODIFICATIONS OF STATE AID FORMULA
RHODE ISLAND JUNIOR COLLEGE COMPUTER CENTER

DATE: 12/10/71 (ROLLIO) PAGE 1

MODIFICATION: NO CHANGE

STANDARD TAX RATE	PROGRAM LEVEL	MINIMUM GUARANTEE	PERCENT OF BASIC PROGRAM
0.01562	$ 500	30.0	65.00

DISTRICT NAME	SHARE RATIO	ADJUSTED ADM	ADJUSTED EWAV	ENTITLEMENT SHARE LAST YEAR	A ENTITLEMENT SHARE BY LAW	B ENTITLEMENT SHARE MODIFIED	DIFFERENCE A LESS B	PERCENT A LESS B
BARRINGTON	0.30000*	4,759	130,282,065	1,124,163	1,277,718	1,277,718	0	0.00
BRISTOL	0.41051	3,489	71,039,547	952,442	1,209,274	1,209,274	0	0.00
BURRILLVILLE	0.62930	2,184	28,734,543	845,096	1,025,806	1,025,806	0	0.00
CENTRAL FALLS	0.54916	2,440	35,496,960	649,597	788,834	788,834	0	0.00
CHARLESTOWN ELEM.	0.30000*	435	12,591,073	77,396	97,022	97,022	0	0.00
COVENTRY	0.58029	5,626	82,936,886	2,122,908	2,520,611	2,520,611	0	0.00
CRANSTON	0.30000*	14,108	353,862,883	2,978,248	3,421,260	3,421,260	0	0.00
CUMBERLAND	0.44976	6,608	124,520,393	1,733,550	2,022,662	2,022,662	0	0.00
EAST GREENWICH	0.39504	2,506	52,616,433	752,282	922,316	922,316	0	0.00
EAST PROVIDENCE	0.36612	10,170	213,720,399	1,837,093	2,506,206	2,506,206	0	0.00
FOSTER ELEM.	0.71881	299	3,994,791	203,939	252,581	252,581	0	0.00
GLOCESTER ELEM	0.59686	521	9,041,060	229,389	272,575	272,575	0	0.00
HOPKINTON ELEM	0.53993	880	14,454,083	291,597	346,878	346,878	0	0.00
JAMESTOWN	0.30000*	687	19,978,603	121,547	147,132	147,132	0	0.00
JOHNSTON	0.41436	4,741	97,391,483	1,138,114	1,389,437	1,389,437	0	0.00
LINCOLN	0.31063	3,574	85,593,147	842,181	832,160	832,160	0	0.00
LITTLE COMPTON	0.30000*	541	19,817,922	100,212	110,026	110,026	0	0.00
MIDDLETOWN	0.63970	4,643	56,624,652	1,643,803	2,085,022	2,085,022	0	0.00
NARRAGANSETT	0.30000*	1,369	55,032,209	303,772	359,601	359,601	0	0.00
NEWPORT	0.51147	3,948	95,633,943	1,942,033	2,508,531	2,508,531	0	0.00

APPENDIX D

Fact Sheet

Designed to Summarize the Salient Facts
about the Proposed Statewide Funding Plan

Prepared: January 1972

$ $

$ ****ALTERNATE PLANS****

REVENUE

$

1. Abolition of local property taxes for education in favor of broader based state taxes, in particular the income tax

$ Assets: Income tax is recognized as a more progressive tax than the property tax
Mechanics of collection are simple

$ Problem: Tax levy required in R. I. would make it the highest state income tax in the nation

$ 2. Local property tax yield equalized by application of a statewide property tax

Assets: Diversity of tax bases

$ Equalization is accomplished

Problems: Equity of statewide assessment techniques
Local or state assessment?

$

3. Major shift of funding burden from local to state sources

Assets: Reduction in average local property tax rate for education

$ Increased equalization over present sharing ration

Problem: Political reality of increasing state taxes

$

DISTRIBUTION

$ 1. Funding budgets submitted by LEA's according to needs of the district's pupil population

Assets: Achievement of equal educational opportunities

$ Programs developed at local level to meet local needs

Problem: Lack of sufficient data to execute program budgeting

$ 2. Distribution by Educational Differential - Pupils are assigned weightings based upon the known relative costs of providing programs (e.g. elementary = 1.00, senior high = 1.40, etc.)

$ Multiplying the weightings times the number of pupils generates a weighted pupil count. A flat grant assigned for the state times the district weighted pupil count yields the allocation.

$ Assets: Allocations are distributed to all districts equitably on the basis of cost by pupil type
Calculation of district allocations is a simple procedure

$ Problems: Establishment of a fair per pupil weightings
Funds for exemplary programs

$ 3. Assumption of the total costs of special programs or services by the state. Used in conjunction with the educational differential plan, the state could assume the total costs of professional salaries and

$ transportation.

Assets: Equalization enhancement
Establishment of a system approach to teacher negotiations

$ and transportation

Problem: Transitional phasing

$ The Excellent Equalized Education Plan (Triple E) as suggested by Commissioner Burke combines choices 2 and 3 from both the Revenue and Distribution alternatives.

$ $

$ $

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APPENDIX F

Sample Data Display

Computer Generated Results

of the Cost Impact of Statewide Funding Plan

on the Forty School Districts

APPENDIX F

Sample Data Display

Computer Generated Results

of the Cost Impact of Statewide Funding Plan

on the Forty School Districts

RHODE ISLAND STATE DEPARTMENT OF EDUCATION
DIVISION OF RESEARCH AND PLANNING
DISTRICT INPUT FACTORS REPORT
RHODE ISLAND JUNIOR COLLEGE COMPUTER CENTER

GROUP:

DATE: 04/07/72 (RD120) PAGE 1

DISTRICT NAME	AVERAGE DAILY MEMBERSHIP BY STUDENT TYPE 1 / 7	2 / 8	3 / 9	4 / 10	5 / 11	6 / 12	CONSTANTS USED TO CALCULATE SHARE BY WEIGHTED PUPIL COUN 1 / 5	2 / 6	3 / 7	4 / 8
BARRINGTON	175	2,325	1,231	1,021	124	186	3,447,874	92,205		
BRISTOL	103	1,931		1,441	119	339	2,363,532	138,034		
BURRILLVILLE	92	1,017	420	637	34	249	1,379,883	118,986		
CENTRAL FALLS	176	1,222	389	636	56	859	1,265,426	9,962		
CHARLESTOWN	32	405			9	37	268,391	29,650		
COVENTRY	220	2,905	965	1,361	50	370	3,999,647	273,911		
CRANSTON	372 526	6,756	3,537	3,296	393	1,239	9,843,773	242,840		
CUMBERLAND	280	4,341		1,828	71	260	3,765,959	231,196		
EAST GREENWICH	130 74	1,173	432	861	78	188	2,149,058	105,669		
EAST PROVIDENCE	411	5,085	2,541	1,771	178	947	5,560,563	181,996		
FOSTER	333 26	277			15	37	234,233	72,428		
GLOCESTER	60	457			1	53	329,807	89,834		
HOPKINTON	62	825			17	71	491,310	50,779		
JAMESTOWN	22	443			1	87	279,797	35,673		
JOHNSTON	177	3,165		1,364	71	394	2,643,757	227,339		
LINCOLN	148	1,668	634	1,090	56	209	2,189,235	152,590		
LITTLE COMPTON	21	393			2	25	218,516	27,452		
MIDDLETOWN	193	2,206	1,089	1,127	43	922	3,165,926	133,560		
NARRAGANSETT	67	676	316		27	87	713,419	97,843		
NEWPORT	261 247	2,707	1,344	1,517	133	1,572	4,918,626	84,027		

RHODE ISLAND STATE DEPARTMENT OF EDUCATION
DIVISION OF RESEARCH AND PLANNING
DISTRICT INPUT FACTORS REPORT
RHODE ISLAND JUNIOR COLLEGE COMPUTER CENTER

DATE: 04/07/72 (BD120) PAGE 2

DISTRICT NAME	AVERAGE DAILY MEMBERSHIP BY STUDENT TYPE 1 / 7	2 / 8	3 / 9	4 / 10	5 / 11	6 / 12	CONSTANTS USED TO CALCULATE SHARE BY WEIGHTED PUPIL COUNT 1 / 5	2 / 6	3 / 7	4 / 8
NEW SHOREHAM	2	50		32		24	78,011	4,947		
NORTH KINGSTON	286	3,203	1,495	1,660	90	537	4,190,084	222,790		
NORTH PROVIDENCE	203	3,327		1,201	42	299	2,828,602	121,910		
NORTH SMITHFIELD	78	987		1,016	35	73	1,307,256	109,663		
PAWTUCKET	586	5,881	2,754	2,332	319	2,734	7,649,057	172,635		
PORTSMOUTH	160 149	2,013		1,309	31	415	2,482,013	166,269		
PROVIDENCE	1,026	10,395	6,503	5,575	1,054	11,704	18,107,652	501,813		
RICHMOND	447 34	419			13	32	256,757	34,373		
SCITUATE	61	890	470	362	5	166	1,173,232	120,882		
SMITHFIELD	149	1,654	575	904	39	241	1,899,086	125,424		
SOUTH KINGSTON	104	1,343	423	967	30	259	2,270,035	123,269		
TIVERTON	98	1,407	446	877	46	162	1,678,245	123,255		
WARREN	94	1,248		1,007	46	283	1,517,168	47,762		
WARWICK	723	9,755	3,081	5,698	378	1,548	12,668,767	630,314		
WESTERLY	177	1,842	911	734	32	222	2,484,396	222,404		
WEST WARWICK	168	1,989	1,156	998	68	467	2,499,095	153,621		
WOONSOCKET	357	4,143	1,850	1,281	197	2,377	4,557,700	129,677		
EXETER-W. GREENWICH	44	753			23	97	554,969	103,382		
CHARIHO	227			1,018	10	81	1,022,251	74,260		
FOSTER-GLOCESTER			496	711	14	91	1,062,941			

RHODE ISLAND STATE DEPARTMENT OF EDUCATION
DIVISION OF RESEARCH AND PLANNING
DISTRIBUTION OF STATE AND LOCAL FINANCIAL RESOURCES
RHODE ISLAND JUNIOR COLLEGE COMPUTER CENTER

DATE: 04/07/72 GROUP:

WEIGHT FACTORS FOR EACH TYPE STUDENT

TYPE 1	TYPE 2	TYPE 3	TYPE 4	TYPE 5	TYPE 6	TYPE 7	TYPE 8	TYPE 9	TYPE 10	TYPE 11	TYPE 12	GRANT PER PUPIL	TOTAL FEDERAL INCOME TAX LEVY
1.40	1.00	1.20	1.40	1.50	1.00	1.80	0.00	0.00	0.00	0.00	0.00	140	390,000,000

DISTRICT NAME	STATE EXPENDITURE	LOCAL EXPENDITURE	A SHARE-STATE & LOCAL	B SHARE-WEIGHTED PUPIL	DIFFERENCE B - A	PERCENT (B - A)/A
BARRINGTON	1,171,192	3,128,078	4,299,270	4,356,432	57,162	1.32
BRISTOL	999,614	2,006,812	3,006,426	3,145,537	139,111	4.62
BURRILLVILLE	869,467	799,268	1,668,735	1,895,304	226,569	13.57
CENTRAL FALLS	704,572	792,140	1,496,712	1,800,527	303,815	20.29
CHARLESTOWN	80,139	265,849	345,988	367,634	21,646	6.25
COVENTRY	2,251,251	2,432,006	4,683,257	5,305,216	621,959	13.28
CRANSTON	3,167,663	8,457,609	11,625,272	12,624,406	999,134	8.59
CUMBERLAND	1,789,950	2,753,901	4,543,851	5,099,668	555,817	12.23
EAST GREENWICH	785,991	1,671,983	2,457,974	2,716,446	258,472	10.51
EAST PROVIDENCE	1,929,465	5,016,590	6,946,055	7,557,140	611,085	8.79
FOSTER	203,939	155,988	359,927	358,502	-1,424	-0.39
GLOCESTER	232,114	224,765	456,879	502,170	45,291	9.91
HOPKINTON	295,283	365,540	660,823	682,382	21,559	3.26
JAMESTOWN	128,516	213,437	341,953	393,883	51,930	15.18
JOHNSTON	1,189,966	2,196,930	3,386,896	3,683,823	296,927	8.76
LINCOLN	867,224	1,828,598	2,695,822	2,963,452	267,630	9.92
LITTLE COMPTON	106,709	178,774	285,482	308,729	23,247	8.14
MIDDLETOWN	1,727,325	1,613,084	3,340,409	4,186,455	846,046	25.32
NARRAGANSETT	312,251	673,156	985,407	989,033	3,626	0.36
NEWPORT	2,143,331	3,057,706	5,201,037	6,262,511	1,061,474	20.40

RHODE ISLAND STATE DEPARTMENT OF EDUCATION
DIVISION OF RESEARCH AND PLANNING
DISTRIBUTION OF STATE AND LOCAL FINANCIAL RESOURCES
RHODE ISLAND JUNIOR COLLEGE COMPUTER CENTER

DATE: 04/07/72 GROUP: (BDI20) PAGE 4

WEIGHT FACTORS FOR EACH TYPE STUDENT

TYPE 1	TYPE 2	TYPE 3	TYPE 4	TYPE 5	TYPE 6	TYPE 7	TYPE 8	TYPE 9	TYPE 10	TYPE 11	TYPE 12	GRANT PER PUPIL	TOTAL FEDERAL INCOME TAX LE
1.30	1.00	1.20	1.40	1.50	1.00	1.80	0.00	0.00	0.00	0.00	0.00	140	390,000,000

DISTRICT NAME	STATE EXPENDITURE	LOCAL EXPENDITURE	A SHARE-STATE & LOCAL	B SHARE-WEIGHTED PUPIL	DIFFERENCE B - A	PERCENT (B - A)
NEW SHOREHAM	32,607	74,660	107,267	99,953	-7,313	-6.81
NORTH KINGSTON	1,908,494	2,221,133	4,129,627	5,583,945	1,454,318	35.21
NORTH PROVIDENCE	901,658	2,526,827	3,488,485	3,739,313	250,828	7.19
NORTH SMITHFIELD	496,703	1,207,984	1,704,687	1,786,000	81,313	4.77
PAWTUCKET	2,600,749	6,532,690	9,133,439	10,161,496	1,028,057	11.25
PORTSMOUTH	1,189,933	1,699,681	2,889,614	3,278,833	389,219	13.46
PROVIDENCE	8,303,373	16,925,927	25,229,300	24,409,243	-820,056	-3.25
RICHMOND	169,490	176,252	345,742	363,187	17,445	5.04
SCITUATE	517,481	990,336	1,507,817	1,604,017	96,200	6.38
SMITHFIELD	1,048,546	1,507,648	2,556,194	2,598,901	42,707	1.67
SOUTH KINGSTON	747,849	2,090,560	2,838,409	2,905,297	66,888	2.35
TIVERTON	586,058	1,549,727	2,135,785	2,295,475	159,690	7.47
WARREN	962,866	923,879	1,886,745	2,003,409	116,664	6.18
WARWICK	5,710,640	9,883,135	15,593,775	16,726,882	1,133,107	7.26
WESTERLY	877,765	2,275,615	3,153,380	3,331,605	178,225	5.65
WEST WARWICK	1,000,701	1,975,799	2,976,500	3,431,227	454,727	15.27
WOONSOCKET	2,628,380	3,379,910	6,008,290	6,268,395	260,105	4.32
EXETER-W. GREENWICH	604,572	146,499	751,071	790,188	39,117	5.20
CHARLHO	511,805	844,837	1,356,642	1,366,682	10,040	0.74
FOSTER-GLOCESTER	656,284	609,418	1,267,702	1,301,304	33,602	2.65
ENTIRE STATE	52,473,915	95,374,731	147,848,646	159,244,630	11,395,984	7.70

RHODE ISLAND STATE DEPARTMENT OF EDUCATION
DIVISION OF RESEARCH AND PLANNING
COLLECTION OF REVENUES FOR PUBLIC SCHOOL OPERATION
RHODE ISLAND JUNIOR COLLEGE COMPUTER CENTER

DATE: 04/01/72 GROUP:

TOTAL SHARE WEIGHTED PUPIL COUNT	PERCENT STATE:LOCAL	TOTAL FULL VALUATION X 1000	C STATE PROPERTY TAX RATE	INCOME TAX FACTORS FACTOR 1	FACTOR 2	FACTOR 3	FACTOR 4	PERCENTAGE INCOME TAX
159,244,630	50.00	6,661,322	11.95					20.42

DISTRICT NAME	LOCAL FULL VALUATION X 1000	A LOCAL SHARE	B LOCAL EXPENDITURE	DIFFERENCE A - B	PERCENT (A-B)/B	D EFFECTIVE TAX RATE	DIFFERENCE D - C	PERCENT (D-C)/C
BARRINGTON	160,883	1,923,023	3,135,473	-1,212,449	-38.66	19.48	7.53	63.04
BRISTOL	118,541	1,416,912	2,010,838	-593,925	-29.53	16.96	5.01	41.91
BURRILLVILLE	52,805	631,174	798,650	-167,475	-20.96	15.12	3.17	26.53
CENTRAL FALLS	69,422	829,796	792,140	37,656	4.75	11.41	-0.54	-4.53
CHARLESTOWN	14,775	176,604	264,139	-87,534	-33.13	17.87	5.92	49.56
COVENTRY	142,149	1,699,097	2,286,802	-587,704	-25.69	16.08	4.13	34.58
CRANSTON	532,160	6,360,871	8,448,186	-2,087,314	-24.70	15.87	3.92	32.81
CUMBERLAND	192,874	2,305,409	2,752,455	-447,045	-16.24	14.27	2.31	19.39
EAST GREENWICH	90,091	1,076,851	1,623,657	-546,805	-33.67	18.02	6.06	50.77
EAST PROVIDENCE	334,994	4,004,159	4,981,888	-977,728	-19.62	14.87	2.91	24.41
FOSTER	8,921	106,632	150,416	-43,783	-29.10	16.86	4.90	41.06
GLOCESTER	16,049	191,832	227,503	-35,670	-15.67	14.17	2.22	18.59
HOPKINTON	29,809	356,304	363,860	-7,555	-2.07	12.20	0.25	2.12
JAMESTOWN	33,902	405,228	369,873	35,355	9.55	10.91	-1.04	-8.72
JOHNSTON	162,038	1,936,828	2,203,860	-267,031	-12.11	13.60	1.64	13.78
LINCOLN	137,317	1,641,340	1,809,558	-168,217	-9.29	13.17	1.22	10.24
LITTLE COMPTON	36,696	438,624	266,709	171,915	64.45	7.26	-4.68	-39.19
MIDDLETOWN	112,417	1,343,712	1,604,117	-260,404	-16.23	14.26	2.31	19.37
NARRAGANSETT	96,356	1,151,736	902,289	249,447	27.64	9.36	-2.58	-21.65
NEWPORT	191,647	2,290,743	2,940,564	-649,820	-22.09	15.34	3.39	28.36

RHODE ISLAND STATE DEPARTMENT OF EDUCATION
DIVISION OF RESEARCH AND PLANNING
COLLECTION OF REVENUES FOR PUBLIC SCHOOL OPERATION
RHODE ISLAND JUNIOR COLLEGE COMPUTER CENTER

DATE: 04/07/72 GROUP:

TOTAL SHARE WEIGHTED PUPIL COUNT	PERCENT STATE:LOCAL	TOTAL FULL VALUATION X 1000	STATE PROPERTY TAX RATE	INCOME TAX FACTORS FACTOR 1	FACTOR 2	FACTOR 3	FACTOR 4	PERCENTAGE INCOME TAX
159,244,630	50.00	6,661,322	11.95					20.42

DISTRICT NAME	LOCAL FULL VALUATION X 1000	A LOCAL SHARE	B LOCAL EXPENDITURE	DIFFERENCE A - B	PERCENT (A-B)/B	D EFFECTIVE TAX RATE	DIFFERENCE D - C	PERCENT (D-C)/C
NEW SHOREHAM	24,449	292,237	74,660	217,577	291.42	3.05	-8.89	-74.45
NORTH KINGSTOWN	168,804	2,017,702	2,038,831	-21,126	-1.03	12.07	0.12	1.04
NORTH PROVIDENCE	159,143	1,902,225	2,538,962	-636,736	-25.07	15.95	4.00	33.47
NORTH SMITHFIELD	71,665	856,606	1,192,317	-335,710	-28.15	16.63	4.68	39.19
PAWTUCKET	528,308	6,314,804	6,519,442	-204,637	-3.13	12.34	0.38	3.24
PORTSMOUTH	116,634	1,394,118	1,695,611	-301,492	-17.78	14.53	2.58	21.62
PROVIDENCE	1,272,924	15,215,171	16,796,064	-1,580,892	-9.41	13.19	1.24	10.39
RICHMOND	15,283	182,676	170,362	12,314	7.22	11.14	-0.80	-6.74
SCITUATE	86,505	1,033,968	999,149	34,839	3.48	11.55	-0.40	-3.36
SMITHFIELD	93,024	1,111,909	1,497,922	-386,012	-25.76	16.10	4.14	34.71
SOUTH KINGSTON	133,720	1,598,345	1,909,563	-311,217	-16.29	14.28	2.32	19.47
TIVERTON	97,454	1,164,860	1,481,689	-316,828	-21.38	15.20	3.25	27.19
WARREN	72,475	866,288	937,422	-71,133	-7.58	12.93	0.98	8.21
WARWICK	661,455	7,906,325	9,856,772	-1,950,446	-19.78	14.90	2.94	24.66
WESTERLY	164,595	1,967,392	2,308,785	-341,392	-14.78	14.02	2.07	17.35
WEST WARWICK	142,211	1,699,838	1,988,292	-288,453	-14.50	13.98	2.02	16.96
WOONSOCKET	216,682	2,589,984	3,366,863	-776,878	-23.07	15.53	3.58	29.99
EXETER-W. GREENWICH	32,953	393,884	337,417	56,467	16.73	10.23	-1.71	-14.33
CHARIHO	35,984	430,114	733,354	-303,239	-41.34	20.38	8.42	70.50
FOSTER-GLOCESTER	33,210	396,956	610,591	-213,634	-34.98	16.38	6.43	53.81
ENTIRE STATE	6,661,322	79,622,315	94,987,045	-15,364,729	-16.17	14.25	2.30	19.29

APPENDIX G

Board of Regents Resolution

on School Finance Reform

April 5, 1973

STATE OF RHODE ISLAND AND PROVIDENCE PLANTATIONS
BOARD OF REGENTS FOR EDUCATION
Room 200, 199 Promenade Street, Providence, Rhode Island 02908

April 5, 1973

RESOLUTION

Although a recent decision by the Supreme Court of the United States failed to acknowledge the existence of a constitutional imperative for equalized educational opportunity through fiscal reform in the several states, the issue of providing equal opportunity in public elementary and secondary education to Rhode Island students remains paramount among the concerns of the Board of Regents for Education. This Board hereby affirms as its policy that any recommendations proposed by this Board for changes in the method of financing public education be designed to eliminate inequality of educational opportunity at the earliest feasible date.

Further, recognizing that the elimination of dollar disparities in the level of support behind each student's schooling is properly the concern of the legislature, the Board hereby affirms as its policy that equal educational opportunity must be ultimately achieved in the educational process itself. Critical as it may be, fiscal reform alone will not insure equality in the learning environment.

Therefore, even in the absence of substantial fiscal realignments, the Board desires that the educational practices in the Department of Education and agencies under its control and influence should reflect its belief that true equality in the treatment of students can be achieved only through recognition of the inherent differences in their individual needs and through the design and provision of educational programs that meet these needs.

Robert A. Pieczman, Chairman Edwin C. Brown Joseph I. Byron Thomas A. Dalton Vernon J. Lisbon

The Commissioner and his staff are hereby directed to take all measures necessary to implement the intent of this resolution. The Board further urges that the local school districts adopt this policy and directs the Commissioner to disseminate this resolution to all concerned, and to offer his services and those of his staff in assisting the local school districts in furtherance of equal educational opportunity.

APPENDIX H

Sample Report

Equalized Weighted Assessed Valuations

Prepared Annually by the Rhode Island
Department of Community Affairs
for the Rhode Island Department of Education

City or Town	Assessed Valuation 12/31/70	Ratio of Assessment	Full Valuation 12/31/70 2/	EWAV* Before Median Family Income Adjustment	Median Family Income Adjustment Factor 3/	Adjusted EWAV* For Computation Purposes	Adjus Presc Section Sub-S
Barrington	$ 112,123,700	62.26%	$ 180,021,145	$ 106,218,344	144.4%	$ 153,379,289	$ 151
Bristol	64,620,060	49.79	129,783,329	76,576,395	100.0	76,576,395	75
Burrillville	43,460,900	77.62	55,989,015	33,035,344	91.9	30,359,481	29
Central Falls	51,206,931	67.97	75,339,256	44,452,617	79.9	35,517,641	35
Charlestown	20,476,215	48.40	42,308,593	24,963,449	100.7	25,138,193	24
Coventry	77,721,590	49.33	157,545,178	92,956,791	109.2	101,508,816	100
Cranston	326,658,720	56.98	573,249,613	338,235,960	110.7	374,427,208	369
Cumberland	127,104,100	60.49	210,134,327	123,986,103	116.2	144,071,852	142
East Greenwich	66,139,000	65.58	100,847,474	59,503,297	129.9	77,294,783	70
East Providence	319,690,530	81.66	391,484,762	230,988,772	104.6	241,614,256	238
Exeter	7,770,589	32.55	23,873,076	14,085,893	95.8	13,494,286	13
Foster	10,957,890	53.49	20,485,867	12,087,329	101.1	12,220,290	12
Glocester	16,849,344	37.41	45,039,675	26,574,877	104.5	27,770,746	27
Hopkinton	31,572,593	74.21	42,545,610	25,103,297	96.9	24,325,095	23
Jamestown	23,404,078	58.22	40,199,378	23,718,944	97.3	23,078,533	22
Johnston	78,119,177	44.45	175,764,183	103,706,598	105.4	109,306,754	107
Lincoln	73,799,719	48.41	152,433,004	89,940,441	107.9	97,045,736	95
Little Compton	15,612,150	37.62	41,499,601	24,486,118	96.8	23,702,562	23
Middletown	64,879,350	52.46	123,673,875	72,971,618	99.1	72,314,873	71
Narragansett	97,970,450	89.01	110,064,734	64,941,781	101.9	66,175,675	65
Newport	82,430,450	39.10	210,835,241	124,399,665	88.3	109,844,904	108
New Shoreham	6,967,685	25.51	27,313,544	16,115,881	85.1	13,714,615	13
North Kingstown	110,005,280	58.62	187,661,006	110,726,111	92.5	102,421,653	101
North Providence	94,266,245	51.10	184,478,240	108,848,176	106.4	115,814,459	114
North Smithfield	34,321,918	42.27	81,197,874	47,909,393	109.7	52,556,604	51
Pawtucket	323,072,915	57.56	561,300,184	331,185,407	95.2	315,288,507	311
Portsmouth	67,620,975	51.97	130,125,777	76,778,451	96.9	74,398,319	73
Providence	849,831,940	63.59	1,336,397,659	788,518 185	86.6	682,856,748	673
Richmond	12,981,788	51.80	25,060,132	14,786,295	97.2	14,372,279	14
Scituate	36,826,400	40.22	91,557,147	54,021,702	109.4	59,099,742	58
Smithfield	82,297,990	74.91	109,862,396	64,822,395	115.6	74,934,689	73
South Kingstown	99,989,940	66.14	151,174,643	89,197,968	103.3	92,141,501	90
Tiverton	64,448,310	61.03	105,606,757	62,311,429	98.4	61,314,446	60
Warren	57,486,625	70.89	81,090,943	47,846,300	94.7	45,310,446	44
Warwick	452,036,996	59.05	731,629,390	431,685,191	113.0	487,804,266	481
Westerly	64,162,195	36.21	177,185,257	104,545,078	103.5	108,204,156	106
West Greenwich	8,290,045	61.16	13,553,814	7,997,192	100.6	8,045,175	7
West Warwick	98,673,069	64.58	152,788,923	90,150,445	97.4	87,806,533	85
Woonsocket	149,087,000	60.85	244,995,990	144,555,621	89.0	128,654,103	126
TOTALS	$4,384,934,893	59.00%1/	$7,296,096,612	$4,30[illegible],934,853		$4,369,906,009	$4,30[illegible]

1/ State average carried out to seven decimal places for computation purposes is 59.0032600

2/ Full value is based upon 1970 market value

3/ Based on U. S. Census Bureau 1970 Census

*Equalized Weighted Assessed Valuation

**Adjusted Factor .986486612

Prepared by: Department of Community Affair[illegible]
Tax Equalization Section - [illegible]

APPENDIX I

Sample Form

Developed to Collect Data on Teacher Characteristics

1972-73 Data Estimates

130

STATE OF RHODE ISLAND AND PROVIDENCE PLANTATIONS

DEPARTMENT OF EDUCATION

Hayes Street, Providence, Rhode Island 02908

Fred G. Burke, Commissioner

September 28, 1972

TO: All Superintendents

FROM: Dr. Fred G. Burke, Commissioner

SUBJECT: Data Collection for Testing Alternative for Financial Assistance to Public School

The Division of Research, Planning and Evaluation has been assigned the task of costing out several proposals for financial assistance to local education agencies. In order to carry out the assignment it is necessary to solicit your assistance in providing some data.

I realize that you are very busy at this time with the opening of schools, but, unfortunately, there is very little for the Department to complete the project. The Commission on School Finance will begin their deliberations soon and we must have the costs of the alternatives ready for them. Therefore, I hope that you can give this request your earliest possible consideration and reply by October 16th.

The following information is requested:

1. Copy of the 1972-1973 teachers' salary scale.
2. Number of full-time teacher equivalents in each step and the aggregate salaries in each step.
3. Total estimated cost of fringe benefits for teachers for 1972-1973.
4. Total estimated cost of substitute teachers for 1972-1973.
5. Total estimated tuition paid out for special education students for 1972-1973

Request number two may need some additional explanation. The term full-time teacher equivalent is the amount of teaching time that is normally required of a teacher to perform a less than full time assignment within an assignment classification.

Example: A full-time teacher has an assignment of 5 teaching periods per day. A part-time teacher with the same assignment classification is assigned 3 teaching periods per day. The full-time teaching equivalent for this teacher would be a 3 ÷ 5 or 3/5ths. The full-time teaching equivalent (3/5ths in this case) would be applied to the salary corresponding to the teacher's position on the salary scale.

Request number three refers to the type of fringe benefits for teachers that have a monetary cost to the school department. These would include such benefits as health insurance plan, life insurance, workmens' compensation, retirement plans, survivors' benefits, reimbursement for accredited courses. Benefits such as sick days, professional days, etc. should not be included at this time.

If you have any questions regarding this matter, please call Mr. Donley R. Taft in the Division of Research, Planning and Evaluation at 277-2666. Your prompt assistance in this task will help us to properly evaluate the merit of these proposals.

Please send the completed form to:

Mr. Donley R. Taft
Division of Research, Planning and Evaluation
State Department of Education
Roger Williams Building
Hayes Street
Providence, R.I. 02908

Thank you for your cooperation.

... THE COLUMNS REFER TO THE CLASSIFICATION GIVEN IN [illegible] STEP IN [illegible] ... IS A DEGREE. PLEASE FILL IN THE COLUMNS WITH THE APPROPRIATE HEADINGS OF YOUR PARTICULAR SALARY SCHEDULE

... INFORMATION ... PLANNING AND EVALUATION ... DEGREE LEVEL BELT

PROVIDENCE, R.I. 02908

SCHOOL DISTRICT

STEP	1*		2*		3*		4*		5*		6*		7*		8*	
	NUMBER IN STEP	AGGREGATE SALARIES	NUMBER IN STEP	AGGREGATE SALARIES	NUMBER IN STEP	AGGREGATE SALARIES	NUMBER IN STEP	AGGREGATE SALARIES	NUMBER IN STEP	AGGREGATE SALARIES	NUMBER IN STEP	AGGREGATE SALARIES	NUMBER IN STEP	AGGREGATE SALARIES	NUMBER IN STEP	AGGREGATE SALARIES
1																
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6																
7																
8																
9																
10																
11																
12																
13																
14																
INCLUDE THE NUMBER AND AGGREGATE SALARIES OF TEACHERS NOT INCLUDED IN THE SALARY SCHEDULE ABOVE **																
TOTALS																

** TEACHERS INCLUDED HERE WOULD BE THOSE SUCH AS, TEACHING SPECIALISTS WHO WORK EITHER FULL-TIME OR PART-TIME AND ARE CONTRACTED SEPARATELY FROM THOSE INCLUDED ON THE REGULAR SALARY SCHEDULE

GRAND TOTALS →

TOTAL NUMBER OF TEACHERS	TOTAL AGGREGATE SALARIES

(OVER)

INSTRUCTIONS

1. USE FULL-TIME TEACHER EQUIVALENTS (EXPLAINED IN LETTER)
2. INCLUDE ONLY THOSE PERSONS WHO ARE ON THE TEACHERS' SALARY SCHEDULE
3. DO NOT INCLUDE SUPERINTENDENTS, PRINCIPALS, DIRECTORS, AND/OR SUPERVISORS
4. INCLUDE TEACHING PERSONNEL NOT ON SALARY SCHEDULE IN THE LINE PROVIDED
5. PLEASE ATTACH A COPY OF YOUR TEACHERS' SALARY SCHEDULE

APPENDIX J

Form I and E

Estimates of School Expenditures

for Current Year

Submitted Annually by School Districts
to the Rhode Island Department of Education
in the Fall

ALL FORM I & E SCHOOL OPERATING INCOME AND EXPENDITURE DATA
Department of Education AND PUPIL SUMMARY DATA
Office of Research,
Planning & Evaluation

School District_____

	Actual 1970-71	Actual 1971-72	Actual 1972-73	Estimate 1973-74
SUMMARY OF CURRENT EXPENDITURES				
—. Current Expenditures from School Revenues (Line 90, Form 31)				
. Current Expenditures for Other Programs				
a. Community Services (Lines 41, 42, 43)				
b. Summer Schools (Line 71)				
c. Adult Education (Line 60)				
—. Total Capital Outlay (Form 31, Line 79, use unstarred items only)				
. Instructional Salaries (Omit breakdown for men and women)				
a. Salaries of Supervisors, etc., (Line 8)				
b. Salaries of Principals (Line 9)				
c. Salaries of Assistant Principals (Line 9A)				
d. Salaries of Classroom Teachers (Line 10)				
e. Salaries of School Librarians (Line 11)				
f. Salaries of Guidance Counselors/ Deans (Line 12)				
g. Salaries of Homebound, Radio & T.V. (Line 12A)				
h. Salaries of Psychological Staff (Line 12B)				
. i. Salaries of Audio-visual Staff (Line 12C)				
j. Salaries of Nurse-teachers (Line 12D)				
5. Transportation--Total expended for transportation of pupils (Lines 39A,B,C)				
6. P. L. 874 Receipts (Line 8)				
. Tuitions Received (Line 21)				
UMMARY OF PUPIL DATA				
. Resident Average Daily Membership Grades ½K-12*				
?. Average Daily Attendance Grades ½K-12**				

*Include pupils attending schools in other districts for whom a district is financially responsible.
*Include pupils in the schools of the district only.

_____
Superintendent of Schools
Date_____

Summary of Nonpublic School Pupil Data--1973/74 School Year

Resident Average Daily Membership*
Grades ½K-12 _____

*Includes all nonpublic school students residing in your city/town regardless of where they are being educated provided the students are not included in your annual Pupil Summary Data Report.

SUPPLEMENTARY MATERIALS

SUPPLEMENTARY MATERIALS - SEQUENTIALLY LISTED

"Some Tentative Proposals for the Finance and Management of Education in Rhode Island," Fred G. Burke, State Department of Education, January 20, 1972.

"Teacher Salary Study," Rhode Island Department of Education, January 24, 1972.

"A Second Step Toward Statewide Funding for Rhode Island's Public Schools," Rhode Island Department of Education, March 10, 1972.

"Statewide Funding for Education, Computer Simulation Exercise: User's Manual," Rhode Island Department of Education, March 24, 1972.

"The Constitutional Status of the Present System of Financing Public Education in Rhode Island," Rhode Island Department of Education, June 26, 1972.

"Possible Implementation Steps for the Proposed Rhode Island Full State Funding Plan for Public Elementary and Secondary Education," Rhode Island Department of Education, December 29, 1972.

"Proposed Recommendations: Rhode Island Full State Funding Plan for Public Elementary and Secondary Education," Rhode Island Department of Education, January 23, 1973.

"Rhode Island Full State Funding Plan: Analysis of Estimated Costs - A Working Document," Rhode Island Department of Education, February 2, 1973.

"Governor's Commission on School Finance: Proposed Outline for Final Report," Rhode Island Department of Education, July 5, 1973.